



# **501 PR342: Processing Requisitions**

Instructor Led Training



# Welcome

Welcome to Cardinal Training!

This training provides employees with the skills and information necessary to use Cardinal. It is not intended to replace existing Commonwealth and/or agency policies.

This course provides information on the Requisition process in Cardinal.

These training materials include diagrams, charts, screenshots, etc., that clarify various Cardinal tasks and processes. The screenshots are taken from Cardinal and show pages that not all users can access. They are included here so you can see how your specific responsibilities relate to the overall transaction or process being discussed. See your agency's Security Handbook, located on the Cardinal website, for a list of available roles and descriptions.





# Course Objectives

After completing this course, you will be able to:

- Identify requisition concepts, processes, integration and interfaces.
- Create and submit a requisition in the Purchasing and the eProcurement modules.
- Maintain a requisition in the Purchasing and the eProcurement modules.
- Use key reports and online inquires used with processing requisitions.





# Course Topics

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This course includes the following topics:

- Lesson 1: Understanding Requisitions
- Lesson 2: Creating a Regular Requisition
- Lesson 3: Creating an eProcurement Requisition
- Lesson 4: Maintaining a Requisition
- Lesson 5: Reports and Online Inquiries
- Lesson 6: Processing Requisitions Hands-On Practice



# Lesson 1: Understanding Requisitions

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This lesson covers the following topics:

- Procurement Overview
- Key Concepts
- Requisition Basics
- Requisition Process
- Integration within Procurement
- Requisition Vendors
- Interfaces with WebIMS and FleetFocus M5



# Procurement Overview

The Procurement functional area of Cardinal includes four modules.

## Purchasing

The Purchasing module includes the buying of goods and services (Procurement) by creating and processing requisitions, purchase orders (PO), receipts, procurement card (PCard), and Integrated Supply Services Program (ISSP) transactions.

## eProcurement

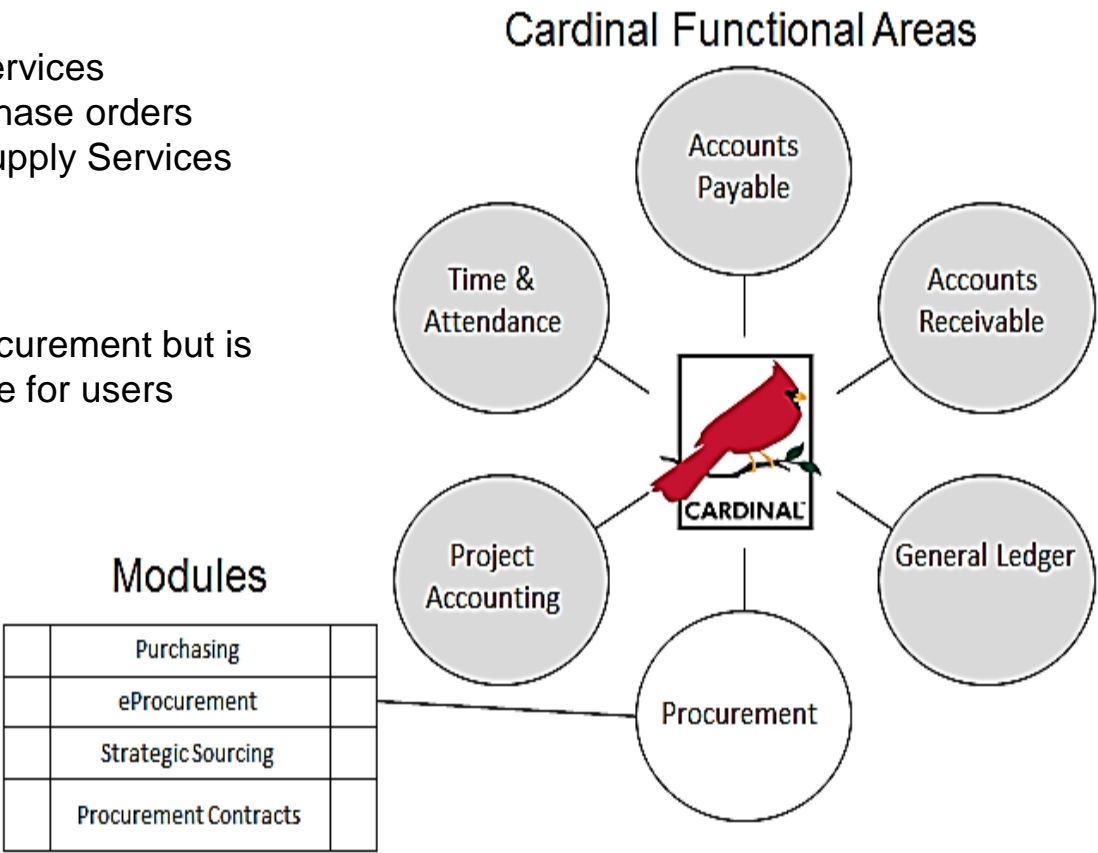
Like Purchasing, the eProcurement module provides for Procurement but is web-based. It is similar to an online shopping cart experience for users requesting goods and/or services.

## Strategic Sourcing

The Strategic Sourcing module allows users to create and award bids / proposals to purchase orders or contracts.

## Procurement Contracts

The Procurement Contracts module builds, manages, and archives all Cardinal contract related information.





- Add / Update Requisitions
- Create Strategic Sourcing Events
- Add / Update Contracts
- Add / Update Purchase Orders
- Add / Update Receipts
- Procurement Card Processing
- Integrated Supply Services Program (ISSP) Processing









# Key Concepts

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Key concepts include:

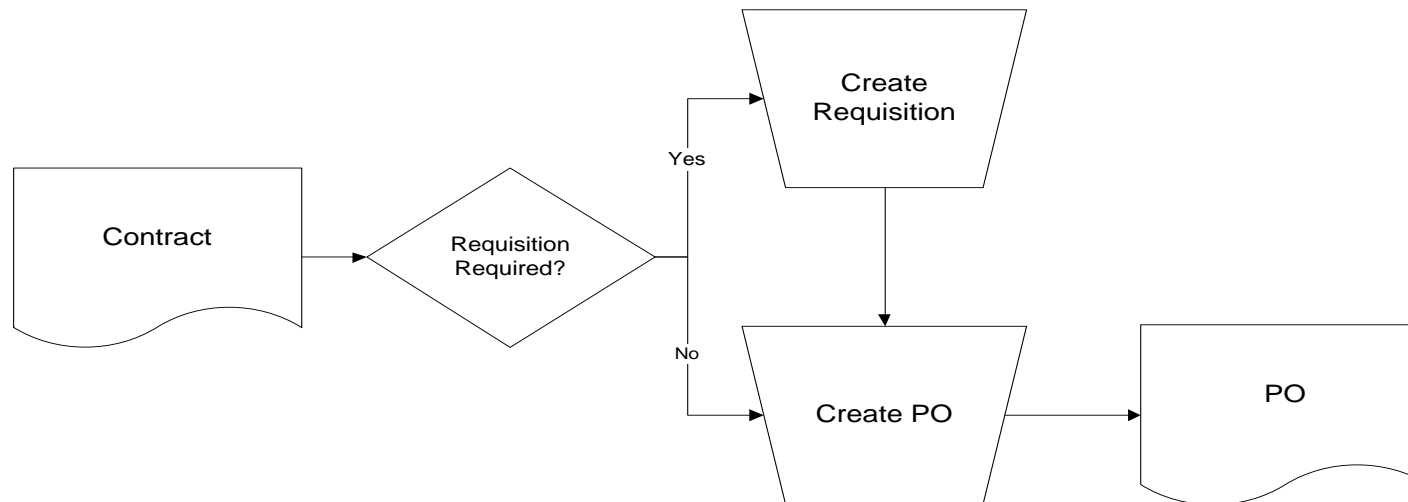
- A requisition is a request for goods and/or services. Requisitions are used to identify and quantify the need for a good or service and document the approval. Once approved, a requisition is sourced to a purchase order (PO) or a sourcing event - Invitation for Bid (IFB) or Request for Proposal (RFP).
- A requisition may be created using either the Purchasing or eProcurement module. However, eProcurement requisitions are not used for IMS restock or issuances.
- Cardinal users share a centralized vendor database maintained by the Commonwealth Vendor Group (CVG). A vendor must be recorded in the statewide vendor database before you can use them on a Cardinal transaction (e.g., requisition, purchase order, sourcing event, voucher, payment)
- eVA is the source of procurement vendor information in Cardinal. Procurement vendors are interfaced from eVA to Cardinal via a nightly interface. Non-procurement vendors, also known as fiscal vendors, are created directly in Cardinal by CVG.



# Requisition Basics

## Requisition Basics:

- Any user can create a requisition. However, only a Buyer can create a purchase order or a sourcing event for the requisition. POs and sourcing events commit the agency to procuring the goods and/or services.
- Purchases in Cardinal must have a PO, but not all POs need a requisition. If a good or a service is already on contract, a requisition is not generally required. You can create a PO against the contract and avoid additional steps.
- Inventory issue and restock transactions must be done using a requisition in the Purchasing module. The data from the requisition is loaded in WebIMS to track inventory quantities.

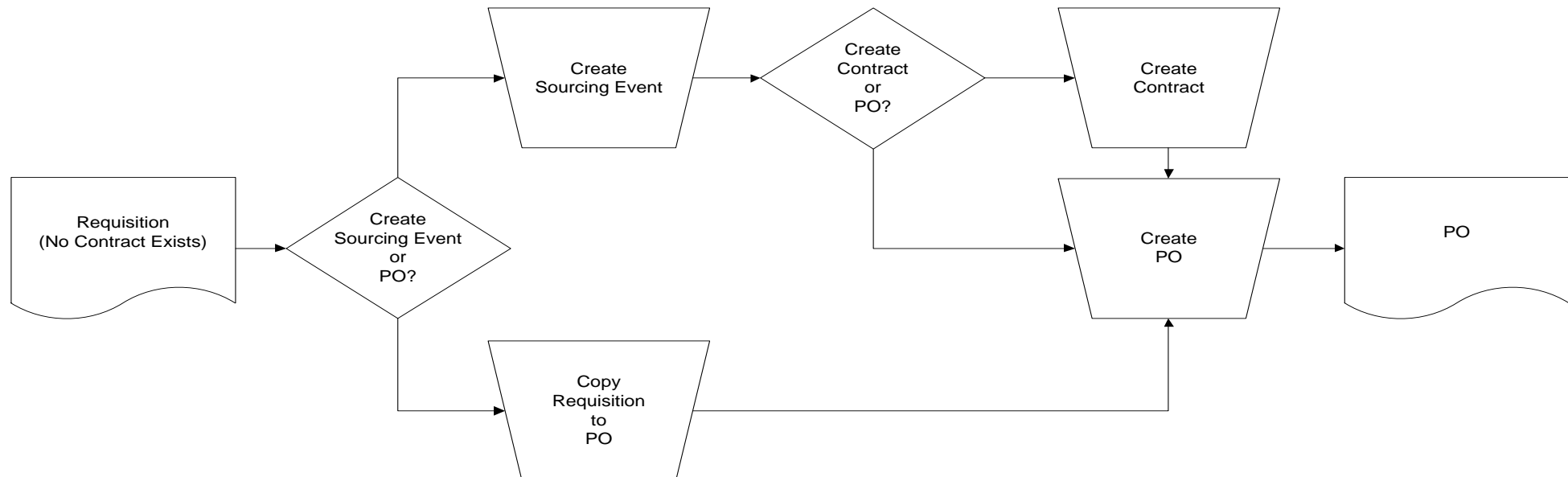


Please refer to the course titled **501 PR347: Inventory Issuances and Restock** for additional details on creating inventory and restock requisitions.



# Requisition Basics (continued)

- If a requisition is created and there is no contract with a vendor, you have two options:
  1. **Create a Sourcing Event:** Once approved, the requisition goes through a solicitation process, which involves creating a sourcing event. This process allows vendors to bid against the event. Winning bidders are awarded a contract or purchase order.
  2. **Copy the Requisition to a Purchase Order:** When the value of goods or services falls within the range of a small purchase or is otherwise permitted, the Buyer can copy the requisition directly into the purchase order, rather than creating a sourcing event and awarding a contract.





## Requisition Basics (continued)

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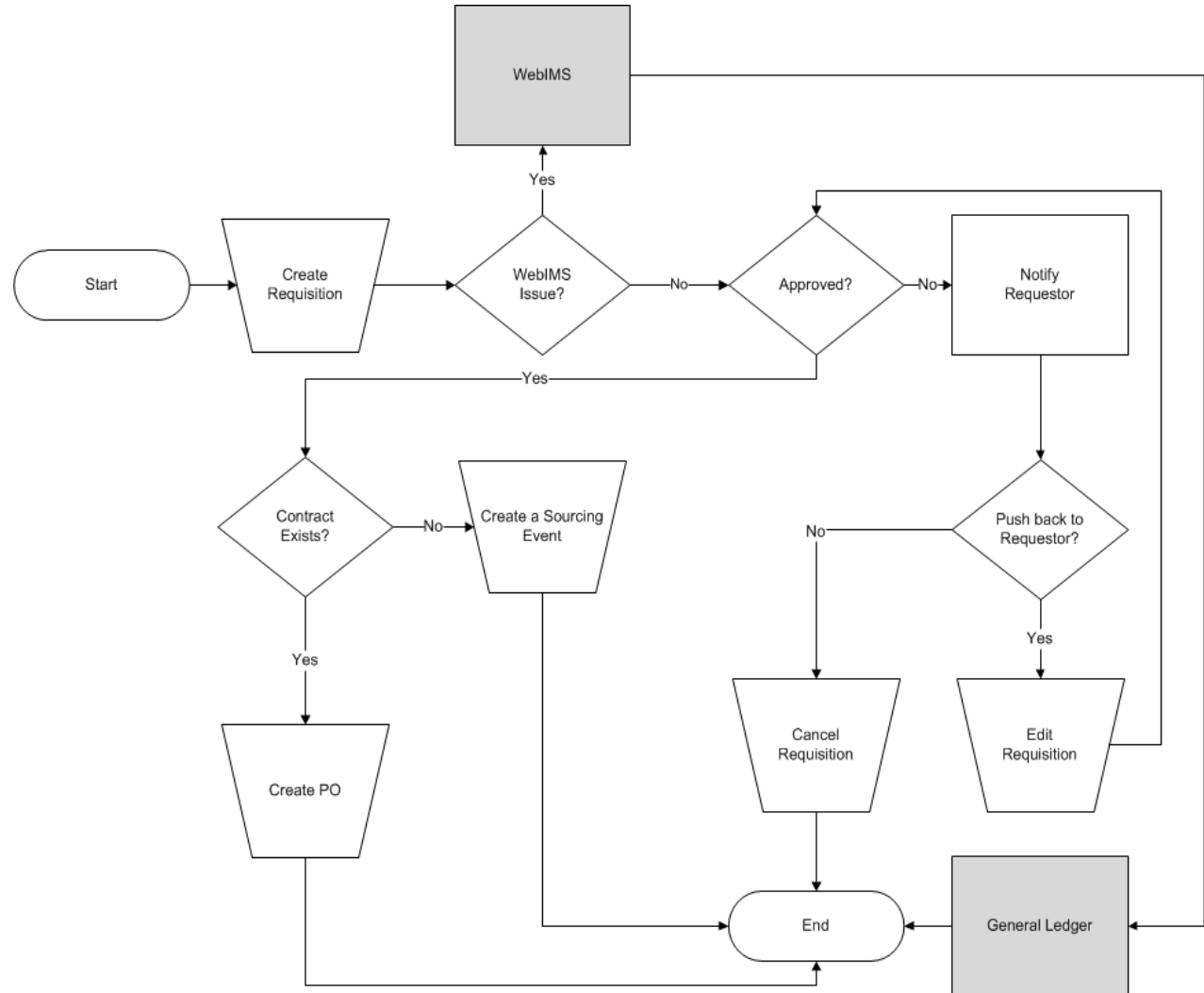
- Requisitions can be set to amount only or quantity. Using amount allows for the receipt by amount.
- When creating a requisition, you may not know which vendor you want to use. This information is only mandatory for contracts and purchase orders.
- eVA Direct Orders (DOs) are loaded directly into Cardinal and purchase orders are created.



# Requisition Process

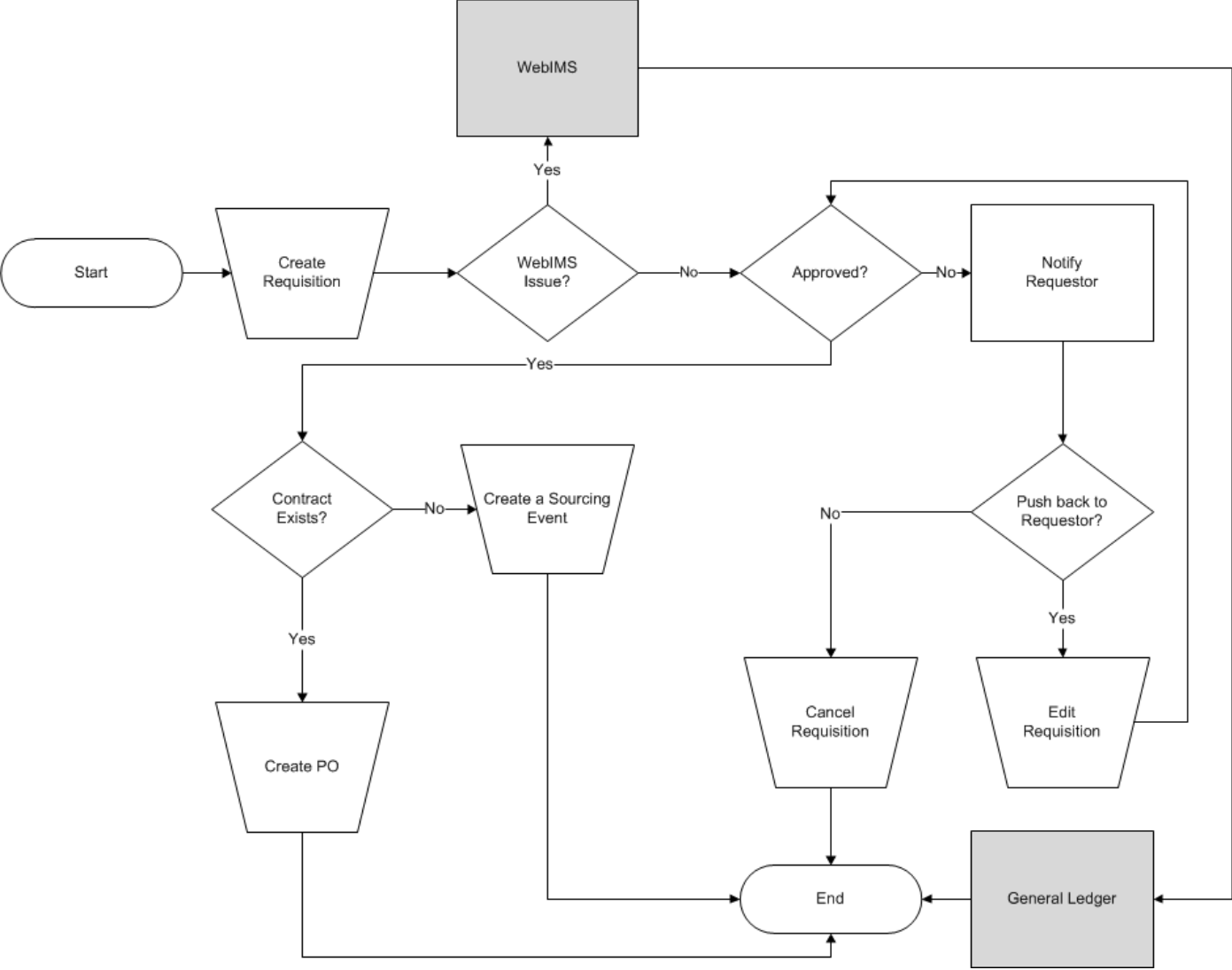
Entering and maintaining requisitions includes:

- Create requisition
- If a contract does not exist, create a sourcing event
- If a contract does exist, create a purchase order by copying the requisition
- Edit requisition
- Cancel requisition





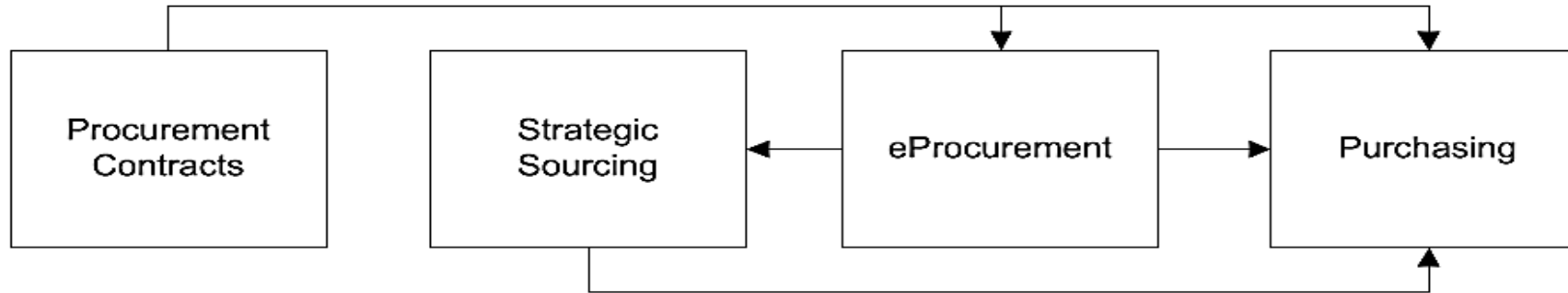
# Requisition Process (continued)





# Integration within Procurement

Processing a requisition involves the interaction of several modules within the Procurement functional area.

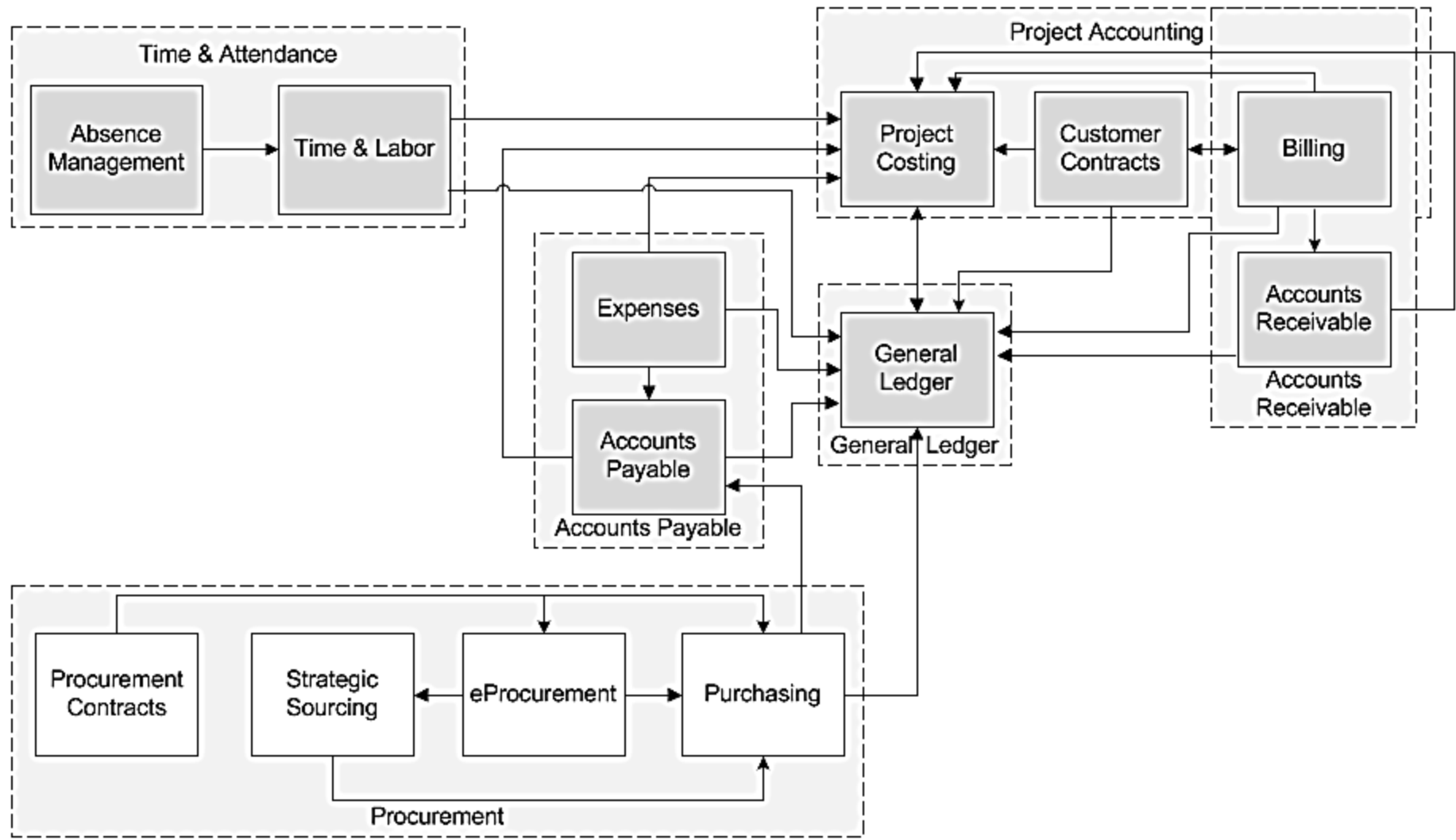


Requisitions interact with Purchasing, Procurement Contracts, Strategic Sourcing, and eProcurement modules:

- **Purchasing / eProcurement:** Requisitions are created in either module.
- **Purchasing:** A requisition can be sourced into a purchase order. Purchase orders are managed in the Purchasing module.
- **Procurement Contracts:** A requisition can be sourced from an established contract. Contracts are managed in the Procurement Contracts module.
- **Strategic Sourcing:** A requisition can be sourced to an event. The event will go through a bid process (solicitation) in the Strategic Sourcing module.



# Integration within Procurement







# Requisition Vendors: eVA and CVG

When creating a requisition, you search for a vendor to add to the requisition. All vendors are shared across the Commonwealth in one centralized database maintained by the Commonwealth Vendor Group (CVG).

A vendor must be added to Cardinal before it can be used on a requisition, purchase order, sourcing event, voucher or payment. However, in creating a requisition, the vendor is not a required field. This can be added later on the purchase order.

eVA updates procurement vendor information through a nightly interface into Cardinal. Non-procurement vendors, also known as fiscal vendors, are created directly in Cardinal by CVG.

eVA Direct Orders (DOs) are loaded directly into Cardinal and purchase orders are created.



# Interfaces with WebIMS and FleetFocus M5

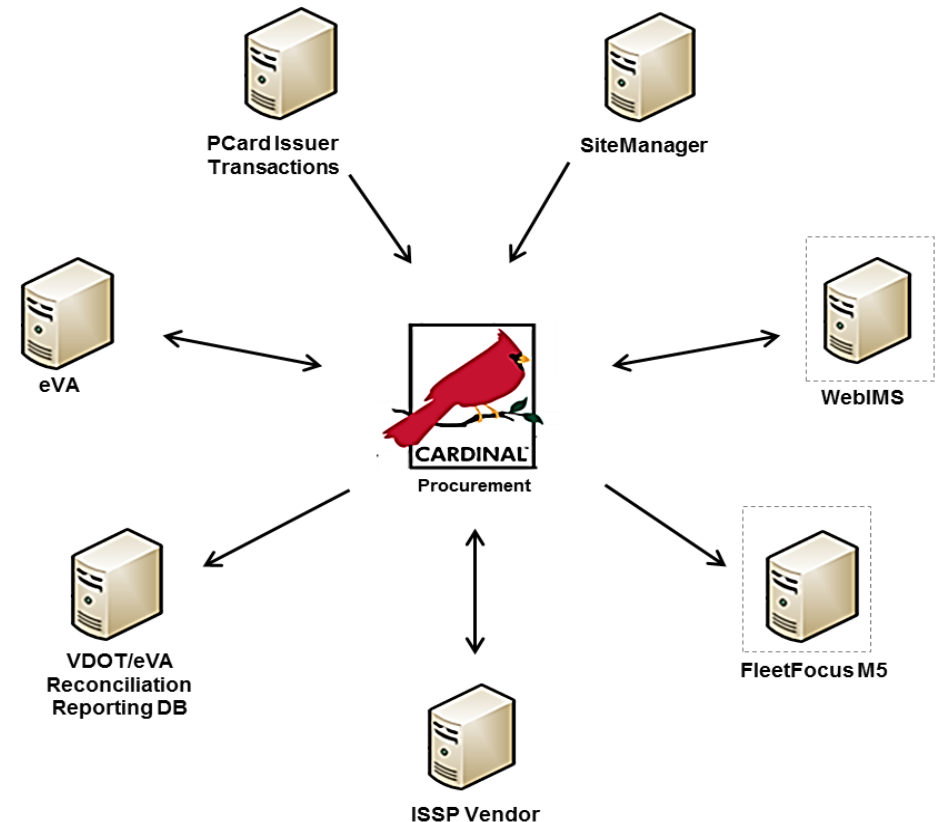
## WebIMS:

**Stock Issuance:** When processing an issuance of stock, a Storekeeper / Requisitioner can order stock items from the web inventory system (WebIMS). WebIMS sends a notification to the Storekeeper alerting them of the status of the order and the document ID (**Doc ID**). WebIMS decrements inventory on hand.

**Stock Reorder:** The Storekeeper can reorder stock for WebIMS by creating a restock type requisition. The restock requisition creates a **Doc ID** and sets flags for the related purchase orders and receipts. Upon getting a receipt tied to a restock requisition, a **Doc ID** is created and interfaced with the quantity to WebIMS to increase quantity on hand.

## FleetFocus M5:

FleetFocus M5 is VDOT's equipment management system which tracks equipment mileage / hours, maintenance, and repair history. In Cardinal, requisitions are created for repairs / parts and FleetFocus M5 records the repair history.



When would an end user create a requisition?

- ☐ When the item is not on contract
- ☐ When a request needs an RFQ (Request for Quote)
- ☐ When the item is on a contract
- ☐ All of the above

When processing a requisition, which external systems specifically interface with the requisition?

- ☐ WebIMS and FleetFocus M5
- ☐ eVA
- ☐ Fleet Focus M5
- ☐ B and C

Does a requisition require approval before it is sent to a Buyer?

☐ Yes

☐ No



# Lesson 1: Summary

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In this lesson, you learned about:

- Procurement
- Requisition key concepts
- Requisition basics
- Two ways to initiate a requisition: Purchasing and eProcurement modules
- Procurement vendors
- The ways requisitions integrate with other Cardinal modules
- The ways requisitions interface with external systems: WebIMS and FleetFocus M5



## Lesson 2: Creating a Regular Requisition

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This lesson covers the following topics:

- Creating a Requisition in the Purchasing Module
- Adding Items
- Requisition Lines
- Requisition Schedules



# Creating a Requisition in the Purchasing Module

When you create a regular requisition in the Purchasing module you may customize it to fit your needs.

To create a requisition in the Purchasing module you navigate to the **Maintain Requisitions – Requisition** page using the following path:

**Main Menu > Purchasing > Requisitions > Add / Update Requisitions**

From the **Add a New Value** tab click **Add**.

The **Maintain Requisitions – Requisition** page displays.

The **Header** section contains some key data to include **Requester**, **Requisition Date**, and **Origin**.

For additional details on creating a requisition from a contract or another requisition please see the job aid titled **Create Requisitions**.





# Creating a Requisition in the Purchasing Module (continued)

Maintain Requisitions

Requisition

Business Unit: 50100

\*WebIMS Req Type: Regular

Status: Open

☒

Requisition ID: NEXT

Requisition Name:

Copy From

☐ Hold From Further Processing

Header

\*Requester:

\*Requisition Date: 06/20/2016

Origin: ONL

\*Currency Code: USD

Requester Info

Online Input

Dollar

Requisition Defaults

Add Comments

Requisition Activities

Amount Summary

Total Amount: 0.00 USD

Add Items From

Purchasing Kit

Item Search

Catalog

Requester Items

Line

Customize | Find | View All | First | 1 of 1 | Last

Details

Ship To/Due Date

Status

Vendor Information

Item Information

Attributes

Contract

Sourcing Controls

WebIMS

| Line | Item                 | Description          | Quantity | *UOM                 | Category             | Price | Merchandise Amount | Status |                      |                      |                      |                      |                      |
|------|----------------------|----------------------|----------|----------------------|----------------------|-------|--------------------|--------|----------------------|----------------------|----------------------|----------------------|----------------------|
| 1    | <input type="text"/> | <input type="text"/> | 0.0000   | <input type="text"/> | <input type="text"/> | 0     | 0.00               | Open   | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

View Approvals

\*Go to: ...More...

Save

Notify

Refresh

Add

Update/Display



# Adding Items

You can add items using either **Item ID** or **Category** to your requisition in multiple ways.

- Key in, or look up, the National Institute of Governmental Purchasing (NIGP) Item number, i.e., **Item**. This is the most common method to select an **Item**. On each line, click on the magnifying glass next to the **Item** field. The items listed will be narrowed down to items related to the supplier you previously selected. The **UOM** and **Description** field values default from the item table.
- Key in or look up the NIGP Category, i.e. **Category**. On each line, click on the magnifying glass next to the **Category** field. This method will not be limited to items related to the chosen supplier. You will need to complete the **UOM** and **Description** fields. These fields become available for entry after the **Category** is selected.

Maintain Requisitions

Requisition

Business Unit:50100

\*WebIMS Req TypeRegular

Status:Open

Requisition ID:NEXT

Requisition Name:

Copy From

☐ Hold From Further Processing

▼ Header

\*Requester:DAVID.MORGAN

Morgan, David E. (VDOT)

Requisition Defaults

Add Comments

Requisition Activities

Amount Summary

\*Requisition Date:08/31/2016

Requester Info

Origin:ONL

Online Input

\*Currency Code:USD

Dollar

Total Amount:0.00 USD

Add Items From

Purchasing Kit

Catalog

Item Search

Requester Items

Line

CustomizeFindView All

First1-2 of 2Last

Details

Ship To/Due Date

Status

Vendor Information

Item Information

Attributes

Contract

Sourcing Controls

WebIMS

| Line | Item       | Description        | Quantity | *UOM | Category | Price | Merchandise Amount | Status |  |  |  |  |
|------|------------|--------------------|----------|------|----------|-------|--------------------|--------|--|--|--|--|
| 1    | 0051404115 | ABRASIVES,         | 2        | RO   | 0051404  | 25.0  | 0.00               | Open   |  |  |  |  |
| 2    |            | Type a Description | 3        | EA   | 005      | 10.   | 0.00               | Open   |  |  |  |  |



# Adding Items (continued)

- Use the **Item Search** hyperlink to search by **Category**, **Description**, or **Item ID**.
- Use the **Requester Items** hyperlink, which lists items the Requester has previously requested.
- The **Purchasing Kit** and **Catalog** hyperlinks are not generally used.

Maintain Requisitions

Requisition

Business Unit:50100

\*WebIMS Req Type:Regular

Status:Open

Requisition ID:NEXT

Requisition Name:

Copy From

Hold From Further Processing

Header

\*Requester:DAVID.MORGAN

Morgan, David E. (VDOT)

Requisition Defaults

Add Comments

Requisition Activities

\*Requisition Date:08/31/2016

Requester Info

Amount Summary

Origin:ONL

Online Input

Total Amount:0.00 USD

\*Currency Code:USD

Dollar

Add Items From

Purchasing Kit

Catalog

Item Search

Requester Items

Line

CustomizeFindView All

First1-2 of 2Last

DetailsShip To/Due DateStatusVendor InformationItem InformationAttributesContractSourcing ControlsWebIMS

| Line | Item       | Description        | Quantity | *UOM | Category | Price | Merchandise Amount | Status |  |  |  |  |  |
|------|------------|--------------------|----------|------|----------|-------|--------------------|--------|--|--|--|--|--|
| 1    | 0051404115 | ABRASIVES,         | 2        | RO   | 0051404  | 25.0  | 0.00               | Open   |  |  |  |  |  |
| 2    |            | Type a Description | 3        | EA   | 005      | 10.   | 0.00               | Open   |  |  |  |  |  |



# Searching Items (continued)

Helpful Hints for Items:

- The **Maintain Requisitions – Requisition** page the **Item Information** tab allows you to enter specific Vendor Item information, e.g., Grainger Catalog, Version 13, pg 6. Item # XXXXXX

| Line  |            |              |        |                          |                          |                |                  |                 |                        |  |
|---|------------|--------------|--------|--------------------------|--------------------------|----------------|------------------|-----------------|------------------------|--|
| Details   Ship To/Due Date   Status   Vendor Information   <b>Item Information</b>   Attributes   Contract   Sourcing Controls   WebMS   [FF] |            |              |        |                          |                          |                |                  |                 |                        |  |
| Line  | Item       | Description  | UPN ID | RFQ Required             | Device Tracking          | Vendor Item ID | Vendor's Catalog | Manufacturer ID | Manufacturer's Item ID |  |
| 1   | 9688880000 | TREE REMOVAL |        | <input type="checkbox"/> | <input type="checkbox"/> |                |                  |                 |                        |  |

- For VDC (Virginia Distribution Center) related items, use the **Manufacturer's Item ID** field to insert VDC stock item number.

| Item Information   Attributes   RFQ   Contract   Receiving   [FF]               |                |                  |                 |                        |        |
|---|----------------|------------------|-----------------|------------------------|--------|
| Description   | Vendor Item ID | Vendor's Catalog | Manufacturer ID | Manufacturer's Item ID | UPN ID |
| CUPS, PAPER, FLAT BOTTOM, NO HANDLE, FOR COLD LIQUIDS, ROLLE 7 OZ DRINKING CUPS |                |                  |                 | 920253                 |        |

- To specify a District/CO and District/Division location, use the **Manufacturer ID** and **Manufacturer's Item ID**.

| Line  |            |              |        |                          |                          |                |                  |                 |                        |  |
|---|------------|--------------|--------|--------------------------|--------------------------|----------------|------------------|-----------------|------------------------|--|
| Details   Ship To/Due Date   Status   Vendor Information   <b>Item Information</b>   Attributes   Contract   Sourcing Controls   WebMS   [FF] |            |              |        |                          |                          |                |                  |                 |                        |  |
| Line  | Item       | Description  | UPN ID | RFQ Required             | Device Tracking          | Vendor Item ID | Vendor's Catalog | Manufacturer ID | Manufacturer's Item ID |  |
| 1   | 9688880000 | TREE REMOVAL |        | <input type="checkbox"/> | <input type="checkbox"/> |                |                  | RICHMOND        | Sandston Residency     |  |



# Searching Items (continued)

Maintain Requisitions

Requisition

Business Unit: 50100      \*WebIMS Req Type: Regular      Status: Pending      ✕

Requisition ID: 0002035030

Requisition Name: 0002035030      ☐ Hold From Further Processing

▼ Header

\*Requester: MIKE.HALL      Hall, Mike (VDOT)      [Requisition Defaults](#)      Card Number:

\*Requisition Date: 03/27/2013      [Requester Info](#)      [Add Comments](#)      Expiration Date:

Origin: ONL      Online Input      [Requisition Activities](#)      ☐ Use Procurement Card

\*Currency Code: USD      Dollar      [Document Status](#)

Amount Summary

Total Amount: 538.80 USD

Add Items From

[Purchasing Kit](#)      [Catalog](#)

[Item Search](#)      [Requester Items](#)

Select Lines To Display

Line:  To:

Line

Details    Ship To/Due Date    Status    Vendor Information    Item Information    Attributes    Contract    Sourcing Controls    WebIMS

Find    View All    First    1 of 1    Last

| Line | Item       | Description    | Quantity | *UOM | Category | Price    | Merchandise Amount | Status  |  |  |  |  |
|------|------------|----------------|----------|------|----------|----------|--------------------|---------|--|--|--|--|
| 1    | 7503548485 | STONE, CRUSHED | 24.0000  | LTN  | 7503548  | 22.45000 | 538.80             | Pending |  |  |  |  |

View Approvals

\*Go to: ...More...



# Requisition Lines

In **Line** section there are multiple tabs which contain information: **Details**, **Ship To / Due Date**, **Status**, **Vendor Information**, **Item Information**, **Attributes**, **Contract**, **Sourcing Controls** and **WebIMS** (for WebIMS-related requisitions).

In addition, you may insert line specific **Comments** or **Attachments** (specs, images, etc.) using the **Line Comments** icon. Click the **Line Comments** icon.

**Maintain Requisitions**

**Requisition**

Business Unit: 50100 \*WebIMS Req Type: Regular Status: Pending

Requisition ID: 0002035030

Requisition Name: 0002035030

☐ Hold From Further Processing

**Header**

\*Requester: MIKE.HALL Hall, Mike (VDOT) [Requester Info](#)

\*Requisition Date: 03/27/2013 [Requisition Defaults](#) [Add Comments](#) [Requisition Activities](#) [Document Status](#)

Origin: ONL Online Input

\*Currency Code: USD Dollar

**Amount Summary**

Total Amount: 538.80 USD

**Select Lines To Display**

Line: To: Retrieve

**Line**

[Details](#) [Ship To/Due Date](#) [Status](#) [Vendor Information](#) [Item Information](#) [Attributes](#) [Contract](#) [Sourcing Controls](#) [WebIMS](#)

| Line | Item       | Description    | Quantity | *UOM | Category | Price    | Merchandise Amount | Status  |
|------|------------|----------------|----------|------|----------|----------|--------------------|---------|
| 1    | 7503548485 | STONE, CRUSHED | 24.0000  | LTN  | 7503548  | 22.45000 | 538.80             | Pending |

[View Approvals](#) \*Go to: ...More...

[Save](#) [Return to Search](#) [Notify](#) [Refresh](#) [Add](#) [Update/Display](#)



# Requisition Lines (continued)

Maintain Requisitions

Requisition

Business Unit: 50100      \*WebIMS Req Type: Regular      Status: Pending      X

Requisition ID: 0002035030

Requisition Name: 0002035030      ☐ Hold From Further Processing

Header

\*Requester: MIKE.HALL      Hall, Mike (VDOT)      [Requisition Defaults](#)      Card Number:

\*Requisition Date: 03/27/2013      [Requester Info](#)      [Add Comments](#)      Expiration Date:

Origin: ONL      Online Input      [Requisition Activities](#)      ☐ Use Procurement Card

\*Currency Code: USD      Dollar      [Document Status](#)

Amount Summary

Total Amount: 538.80 USD

Add Items From

[Purchasing Kit](#)      [Catalog](#)

[Item Search](#)      [Requester Items](#)

Select Lines To Display

Line:  To:

Line

Details    Ship To/Due Date    Status    Vendor Information    Item Information    Attributes    Contract    Sourcing Controls    WebIMS

| Line | Item       | Description    | Quantity | *UOM | Category | Price    | Merchandise Amount | Status  |  |                                      |  |   |
|------|------------|----------------|----------|------|----------|----------|--------------------|---------|--|--------------------------------------|--|---|
| 1    | 7503548485 | STONE, CRUSHED | 24.0000  | LTN  | 7503548  | 22.45000 | 538.80             | Pending | <input type="button" value="Comment"/> | <input type="button" value="Print"/> | <input type="button" value="Refresh"/> | <input type="button" value="+"/> <input type="button" value="-"/> |

[View Approvals](#)      \*Go to: ...More...

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# Requisition Lines (continued)

The **Line Comments** page allows you enter comments, add attachments, or access and use standard comments that are pre-loaded in the system.

**Line Comments**

Business Unit: 50100

Requisition Date: 03/19/2013

Requisition ID: NEXT

Status: Open

Line: 1

\*Sort Method: Comment Time Stamp

\*Sort Sequence: Ascending

Sort

Comments

Find | View All | First | 1 of 1 | Last

Use Standard Comments

Comment Status: Active

Inactivate

Undo

+

Use Item Specifications

☐ Send to Vendor

☐ Show at Receipt

☐ Show at Voucher

Associated Document

Attachment:

Attach

View

Delete

☐ Email

From -> REQ 50100-NEXT

OK

Cancel

Refresh





# Requisition Lines (continued)

## Amount Only:

The requested goods or services may be a single total amount and/or invoiced in different amounts (not quantities). Using the **Maintain Requisitions – Requisition** page, on the **Attributes** tab under the **Line** section, **Amount Only** may be selected. Requesting and ordering using **Amount Only** allows the line to be received only by invoiced amount (dollars) instead of by quantity.

**Maintain Requisitions**  
**Requisition**

**Business Unit:** 50100    **\*WebIMS Req Type** Regular ☒    **Status:** Open ☒  
**Requisition ID:** NEXT  
**Requisition Name:**  [Copy From](#)    ☐ **Hold From Further Processing**

**Header**

**\*Requester:** YANI.HO  Ho, Yani (VDOT)    [Requisition Defaults](#)  
**\*Requisition Date:** 06/20/2016  [Requester Info](#)    [Add Comments](#)  
**Origin:** ONL  Online Input    [Requisition Activities](#)  
**\*Currency Code:** USD  Dollar    **Amount Summary**  
**Total Amount:** 45.00 USD

**Add Items From**  
[Purchasing Kit](#)    [Catalog](#)  
[Item Search](#)    [Requester Items](#)

**Line**    [Customize](#) | [Find](#) | [View All](#) | [First](#) | [1-2 of 2](#) | [Last](#)

**Details** | **Ship To/Due Date** | **Status** | **Vendor Information** | **Item Information** | **Attributes** | **Contract** | **Sourcing Controls** | **WebIMS** | **Item**

| Line | Item       | Description                            | Buyer                | Name                 | Physical Nature            | Zero Price Indicator     | Amount Only                         | Inspection Required      | Inspect ID           |
|------|------------|--|----------------------|----------------------|----------------------------|--------------------------|-------------------------------------|--------------------------|----------------------|
| 1    | 0051417548 | CLOTHS, ABRASIVE, <input type="text"/> | <input type="text"/> | <input type="text"/> | Goods <input type="text"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="text"/> |
| 2    | 0051417550 | CLOTHS, ABRASIVE, <input type="text"/> | <input type="text"/> | <input type="text"/> | Goods <input type="text"/> | <input type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="text"/> |



# Requisition Lines (continued)

## Amount Only (continued):

**Amount Only** Example: We have a requisition for the installation of two storage units. Each unit will have a fixed price, but the vendor may bill for odd amounts during the project. **Amount Only** will allow you to receive the actual invoice amount, instead of a percent of each storage unit.

When you click the **Amount Only** checkbox:

- The **Quantity** is set to '1' for an amount only line and Quantity becomes unavailable for entry. The line is repriced accordingly.
- The **Price** field on the line is available for entry.
- The **Price** you enter becomes the schedule price and amount.
- The **Distribute By** field, located on the **Distribution** page, is set to **Amount** and cannot be modified.

| Line   |            |                   |          |     |          |          |                    |        |  |  |  |
|--|------------|-------------------|----------|-----|----------|----------|--------------------|--------|--|--|--|
| Details  |            |                   |          |     |          |          |                    |        |  |  |  |
| Ship To/Due Date   Status   Vendor Information   Item Information   Attributes   Contract   Sourcing Controls   WebIMS |            |                   |          |     |          |          |                    |        |  |  |  |
| Line   | Item       | Description       | Quantity | UOM | Category | Price    | Merchandise Amount | Status |  |  |  |
| 1  | 0051417548 | CLOTHS, ABRASIVE, | 1.0000   | EA  | 0051417  | 15.00000 | 15.00              | Open   |  |  |  |
| 2  | 0051417550 | CLOTHS, ABRASIVE, | 3.0000   | PK  | 0051417  | 10.00000 | 30.00              | Open   |  |  |  |

To view the **Distribute By** field and ChartField distribution for a line, from the **Details** tab click the **Schedule** icon.



# Requisition Lines (continued)

## Amount Only (continued):

From the **Schedule** page click on the distribution icon.

Maintain Requisitions

Schedule

Business Unit: 50100

Requisition Date: 06/20/2016

Requisition ID: NEXT

Status: Open

[Return to Main Page](#)

Line

Find | View All | First | 1 of 2 | Last

1    Item: 0051417548    CLOTHS, ABRASIVE, EMERY, 9 IN.    Quantity: 1.0000 Each    Merchandise Amt: 15.00 USD

Schedule

Customize | Find | View All | | | First | 1 of 1 | Last

Details

| Sched |  | *Ship To |  | Quantity | Price    | Merchandise Amount | Due Date | Attention To    |  | Status |
|-------|--|----------|--|----------|----------|--------------------|----------|-----------------|--|--------|
| 1     |  | NOVA EC  |  | 1.0000   | 15.00000 | 15.00              |          | Ho, Yani (VDOT) |  | Active |



# Requisition Lines (continued)

## Amount Only (continued):

The **Distribute By** field, located on the **Distribution** page, is set to **Amount** and cannot be modified.

Maintain Requisitions

Distribution

Requisition ID: NEXT

Line: 1

Schedule: 1

Item: 0051417548

Status: Active

Ship To: NOVA EQP NOVA EQP

Quantity: 1.0000 EA

Open Amount: 15.000

Merchandise Amt: 15.00 USD

\*Distribute By: Amount

SpeedChart:

Multi-SpeedCharts

Distributions

Chartfields

Details

Asset Information

| Distrib |      | Percent  | GL Unit | Entry Event | Account | Fund | Program | Department | Cost Center | Task | FIPS |
|---------|------|----------|---------|-------------|---------|------|---------|------------|-------------|------|------|
| 1       | Open | 100.0000 | 50100   |             | 5013540 |      |         | 19059      |             |      |      |

OK

Cancel

Refresh

- Click **OK** to return to the **Schedule** page.



# Requisition Schedules

The schedule information defines when and where you want the item delivered and when it is due. On the **Schedule** page, the **Ship To** location should default per the user's set-up. These fields can be edited as necessary. Do not enter more than one schedule, i.e., **Ship To** location, for a line. The interface with EVA does not permit such an action and will cause the subsequent PO to error out. Create another line for each separate schedule required.

From the **Schedule** page, click the **Distribution** icon to enter accounting distributions.

Favorites

Main Menu > Purchasing > Requisitions > Add/Update Requisitions

New Window

Maintain Requisitions

Schedule

Business Unit: 50100

Requisition Date: 10/05/2012

Requisition ID: 0002030225

Status: Open

Return to Main Page

Line

Find | View All | First 1 of 1 Last

1 Item: 9888988005 VEGETATION MANAGEMENT ROADSIDE Quantity: 1.0000 Each Merchandise Amt: 2,500.00 USD

Schedule

Details

Customize | Find | View All | First 1 of 1 Last

| Sched | *Ship To | Quantity | Price       | Merchandise Amount | Due Date | Attention To     | Status |
|-------|----------|----------|-------------|--------------------|----------|------------------|--------|
| 1     | CNTRL    | 1.0000   | 2,500.00000 | 2,500.00           |          | Hall, Mike (VDO1 | Active |

Add Ship To Comments

Save Return to Search Notify Refresh Add Update/Display



# Requisition Schedules (continued)

A **Schedule** may have one or more **ChartField** distributions. The **ChartField** values identify the accounting distribution. The insertion of valid **Account**, **Department**, **Cost Center** or **Project** values are required. You can manually enter a ChartField value, or you can use the **Multi-SpeedCharts** hyperlink to select a **SpeedChart** value to automatically populate some of the ChartField values for you.

You may insert, or delete, additional accounting distributions, by scrolling right and clicking on the **+** / **-** icons at the end of the accounting distribution line.

**CARDINAL** Home | Worklist | Add to F

Favorites | Main Menu > Purchasing > Requisitions > Add/Update Requisitions

New Window ? Help Custom

**Maintain Requisitions**

**Distribution**

Requisition ID: 0002030225 Item: 9888988005 [VEGETATION MAN](#)  
Line: 1 Status: Active  
Schedule: 1

Ship To: CNTRL OF2 CNTRL OF2 Quantity: 1.0000 EA  
\*Distribute By: Quantity Open Quantity: 1.0000  
\*Liquidate by: Amount Merchandise Amt: 2,500.00 USD  
SpeedChart: [Multi-SpeedCharts](#)

**Distribution:**

Chartfields Details Asset Information Budget Information

| Distrib |      | Percent  | Quantity | Merchandise Amount | GL Unit | Entry Event | Account | Fund  | Program | Department | Cost Center | Task | FIPS |
|---------|------|----------|----------|--------------------|---------|-------------|---------|-------|---------|------------|-------------|------|------|
| 1       | Open | 100.0000 | 1.0000   | 2,500.00           | 50100   |             | 5012550 | 04100 | 699001  | 10003      | 11120010    |      |      |

OK Cancel Refresh



# Requisition Schedules (continued)

You are able to add or delete a line using the **+/-** icons next to an existing line, and edit any part of the requisition, as you build it. Once **Saved**, click the **Submit for Approval** checkbox, which is next to the **Status** field, to send it forward for approval by your Supervisor.

Maintain Requisitions

Requisition

Business Unit: 50100      \*WebIMS Req Type: Regular      Status: Open      ☒ ☐

Requisition ID: 0002035028      ☐ Hold From Further Processing

Requisition Name: 0002035028

Header

\*Requester: MIKE.HALL      Hall, Mike (VDOT)      [Requisition Defaults](#)      Card Number:

\*Requisition Date: 02/20/2013      [Requester Info](#)      [Add Comments](#)      Expiration Date:

Origin: ONL      Online Input      [Requisition Activities](#)      ☐ Use Procurement Card

\*Currency Code: USD      Dollar      [Document Status](#)

Amount Summary

Total Amount: 264.72 USD

Add Items From

[Purchasing Kit](#)      [Catalog](#)

[Item Search](#)      [Requester Items](#)

Select Lines To Display

Line:  To:

Line

Details      Ship To/Due Date      Status      Vendor Information      Item Information      Attributes      Contract      Sourcing Controls      WebIMS

| Line | Item       | Description    | Quantity | *UOM | Category | Price    | Merchandise Amount | Status |                                  |                                  |  |  |
|------|------------|----------------|----------|------|----------|----------|--------------------|--------|----------------------------------|----------------------------------|--|--|
| 1    | 7503548485 | STONE, CRUSHED | 24.0000  | LTN  | 7503548  | 11.03000 | 264.72             | Open   | <input type="button" value="+"/> | <input type="button" value="-"/> |  |  |

[View Approvals](#)      \*Go to: ...More...





# Simulation: Creating a Regular Requisition

You are now about to view a simulation entitled **Creating a Regular Requisition**. Click the Cardinal logo below to start the simulation.





On a requisition, a line cannot have multiple distributions.

- ☐ True
- ☐ False

The **Amount Only** function sets the line quantity to 1 and allows you to enter a dollar value.

- ☐ True
- ☐ False



## Lesson 2: Summary

---

In this lesson, you learned how to:

- Create a regular requisition using the Purchasing module
- Search for items to add to the requisition in the Purchasing module
- Modify requisitions schedules in the Purchasing module
- Update accounting distributions in the Purchasing module



# Lesson 3: Creating an eProcurement Requisition

---

This lesson covers the following topics:

- Steps to create an eProcurement Requisition
- Create and Use eProcurement Templates

eProcurement offers a form-based procurement process that walks you through the steps to create a requisition. eProcurement may be used for a regular requisition but is not used for IMS (inventory).



# Create an eProcurement Requisition

The first step in creating an eProcurement requisition is to define the requisition. The **Define Requisition** tab on an eProcurement requisition contains the **Business Unit**, **Requester**, **Requisition Name**, **Priority** of the requisition, **Line Defaults** and **Shipping Defaults**.

You can navigate to the **Create Requisition** page using the following path:

**Main Menu > eProcurement > Create Requisition**

**Create Requisition**

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: 50100 VA Dept of Transportation  
Requester: MIKE HALL Hall, Mike (VDOT) \*Currency: USD  
Requisition Name: Priority: Medium

**Line Defaults**  
Note: The defaults specified below will be applied to requisition lines when there are no predefined values for these fields.  
Vendor: Vendor Location: Buyer: Category: Unit of Measure:

**Shipping Defaults**  
Ship To: CNTRL OF2 Modify Onetime Address  
Due Date: Attention:

**Accounting Defaults**  
Chartfields1 Chartfields2 Chartfields3 Details Asset Information  
Location: CNTRL OF1 GL Unit: 50100 Entry Event: Account:

Continue

**Requisition Summary**  
There are no lines on this request.  
Please add new line in order to save this requisition.  
Total Lines: 0  
Total Amount (USD): 0



# Create an eProcurement Requisition (continued)

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > eProcurement > Create Requisition

## Create Requisition

**1. Define Requisition**

**2. Add Items and Services**

**3. Review and Submit**

Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: 50100 VA Dept of Transportation

Requester: MIKE.HALL Hall, Mike (VDOT)

\*Currency: USD

Requisition Name:

Priority: Medium

Line Defaults

Note: The defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

Vendor:

Vendor Location:

Buyer:

Category:

Unit of Measure:

Shipping Defaults

Ship To: CNTRL OF2 [Modify Onetime Address](#)

Due Date:

Attention:

Accounting Defaults

Chartfields1 | Chartfields2 | Chartfields3 | Details | Asset Information

| Location  | GL Unit | Entry Event | Account |
|-----------|---------|-------------|---------|
| CNTRL OF1 | 50100   |             |         |

Continue

Help

Requisition Summary

There are no lines on this request. Please add new line in order to save this requisition.

Total Lines: 0

Total Amount (USD): 0



# Add Items and Services

The second step in creating an eProcurement requisition is adding items and services.

- From the **Create Requisition** page, click the **Add Items and Services** tab. This tab gives you options to search for items to add to the requisition. You may search for the items using two methods:
  - Browse Catalog:** Insert the name of an item and search all Cardinal catalogs.
  - Search Catalog:** Entering the **Description, Manufacturer, Manufacturer ID, Vendor, Vendor Item ID, and/or Item ID number**.
- Click the **Search** button.

**CARDINAL**

Favorites | Main Menu > eProcurement > Create Requisition

### Create Requisition

1. Define Requisition | **2. Add Items and Services** | 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

[Catalog](#) | [Favorites](#) | [Templates](#) | [Forms](#) | [Web](#) | [Special Request](#)

#### Browse Catalog

\*Select a catalog:

☐ Left | ☐ Right | ☒ All Categories

- Choose from available catalogs in the dropdown list
- Navigate categories by clicking folders
- View items in a category by clicking the category name
- Use the checkboxes to select categories to search below

#### Search Catalog

Search contains all of the following search fields entered:

Description:

Manufacturer:

Manufacturer's Item ID:

Vendor:

Vendor Item ID:

Item ID:

UPN ID:

☐ Include Images


[Search Settings](#)

[Review and Submit](#)



# Add Items and Services (continued)

Select the item from the search results. Enter the **Quantity**, and click **Add**.




Favorites | Main Menu > eProcurement > Create Requisition










Only the first 50 results can be displayed. Please refine your search criteria.

Sort Items:  
Item Description ▾

First 1 - 25 of 50 Last

Show Images

Item Detail  
Details | Item IDs | 

|                                     | Item Description               | Vendor                    | Manufacturer | Price    |     | UOM    |  | Quantity |   |
|-------------------------------------|--------------------------------|---------------------------|--------------|----------|-----|--------|--|----------|---|
| <input type="checkbox"/>            | PAPER AND SUPPLIES FOR 3M MODE |                           |              | 0.01000  | USD | Each   |  | 1.0000   |  Add   |
| <input type="checkbox"/>            | PAPER AND TONER COMBINATION FO |                           |              | 0.01000  | USD | Each   |  | 1.0000   |  Add   |
| <input type="checkbox"/>            | PAPER INTERMEDIATE, BLACK, FOR |                           |              | 0.01000  | USD | Each   |  | 1.0000   |  Add   |
| <input type="checkbox"/>            | PAPER PLASTIC, W/RETAINER, WHI |                           |              | 0.01000  | USD | Each   |  | 1.0000   |  Add   |
| <input type="checkbox"/>            | PAPER TOP GASKET, PAPER - FORD |                           |              | 0.01000  | USD | Each   |  | 1.0000   |  Add  |
| <input type="checkbox"/>            | PAPER TREATMENT CHEMICALS (DEA |                           |              | 0.01000  | USD | Each   |  | 1.0000   |  Add |
| <input type="checkbox"/>            | PAPER W/ METAL RIM, 1 IN., STR |                           |              | 0.01000  | USD | Bundle |  | 1.0000   |  Add |
| <input checked="" type="checkbox"/> | PAPER WEIGHT, SERVICE AWARD    | O C Tanner Recognition Co |              | 23.64000 | USD | Each   |  | 5.0000   |  Add |
| <input type="checkbox"/>            | PAPER, 12 IN., OIL DRYER AND F |                           |              | 0.01000  | USD | Box    |  | 1.0000   |  Add |





# Add Items and Services (continued)

Once your item(s) have been added you may select the **3. Review and Submit** tab. The item you identified is listed.

Click the **Modify Line / Shipping / Accounting** tab to modify any items, identify your shipping location, and enter the accounting distribution(s).

**CARDINAL**

Favorites | Main Menu > eProcurement > Create Requisition

### Create Requisition

☒ 1. Define Requisition ☐ 2. Add Items and Services ☒ 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: 50100 VA Dept of Transportation  
Requester: DOLLYMADISON MADISON, DOLLY  
Requisition Name: paper chase  
\*Currency: USD  
Priority: Medium

| Line | Description                | Vendor Name               | Quantity | UOM  | Price    | Total  |
|------|----------------------------|---------------------------|----------|------|----------|--------|
| 1    | AWARDS, VIRGINIA DOT PAPER | O C Tanner Recognition Co | 5.0000   | Each | 23.64000 | 118.20 |

☒ Select All / Deselect All

Total Amount: 118.20 USD

Comments

☐ Send to Vendor ☐ Show at Receipt ☐ Shown at Voucher ☐ Approval Justification

[Find more items](#)



# Add Items and Services (continued)

From the **Modify Line / Shipping / Accounting** page:

- From the **Chartfields1** tab, enter the **Percent** that will be charged to the first accounting distribution. The total of all lines must equal 100%.
- Click the **Location** drop-down icon and select the location you want the item shipped to.
- Scroll through **Chartfields1**, **Chartfields2**, and **Chartfields3** tabs to enter the accounting distribution(s). To add or delete additional distribution rows, click **+/-** icon.
- To save and return to the **Create Requisition** page, click the **Apply**.

**Cardinal**  
Favorites | Main Menu > eProcurement > Create Requisition

**Create Requisition**  
**Modify Line / Shipping / Accounting**

**Line Information**  
Note: The information below does not reflect the data in the selected requisition lines. When the 'Apply' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines.  
Vendor ID:  Vendor Location:   
Buyer:  Category:

**Shipping Information**  
Ship To:  [Modify Onetime Address](#)  
Due Date:  Attention:

**Accounting Information**  
Customize | Find | | | First 1 of 1 Last  
**Chartfields1** | Chartfields2 | Chartfields3 | Details | Asset Information |

|   | Percent              | Location             | GL Unit              | Entry Event          | Account              |  |
|---|----------------------|----------------------|----------------------|----------------------|----------------------|--|
| 1 | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |  |

[Load Values From Defaults](#)

**Apply** **Cancel**



# Special Request

In addition to the standard item search features, a **Special Request** option allows you to order an item without using a pre-loaded Item / Catalog item. On the **Special Request** tab the user may select:

- **Special Item:** Add an item not in the catalog.
- **Fixed Cost Service:** Add a one-time service for a flat fee.
- **Variable Cost Service:** Add a service that is fee based on time worked.
- **Time and Materials:** Add an service with a fee based on the time worked and materials used.

This feature is not regularly used. The **Search Results** tab displays after using the search feature. It allows you to toggle back and forth from the search results and requisition features.

**Create Requisition**

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

[Catalog](#) [Favorites](#) [Templates](#) [Forms](#) [Web](#) [Special Request](#) [Search Results](#)

**Select a Request Type**

|                                       |   |
|---------------------------------------|---|
| <a href="#">Special Item</a>          | Request an item that is not listed in the Catalog.                                  |
| <a href="#">Fixed Cost Service</a>    | Request a one-time service for a flat fee.  |
| <a href="#">Variable Cost Service</a> | Request a service for which the fee is based on the time worked.                    |
| <a href="#">Time and Materials</a>    | Request a service for which the fee is based on the time worked and materials used. |

[Review and Submit](#)

**Requisition Summary**  
There are no lines on this request.  
Please add new line in order to save this requisition.

Total Lines: 0  
Total Amount (USD): 0



# Review and Submit

The final step in creating an eProcurement requisition is to review and submit the requisition for approval and further processing.

The **Review and Submit** tab displays the requisition for review before submitting for approval. Expand each line using the **Expand Section** dropdown arrow icon next to the line. Here you can review the shipping details. The tabs give additional information on the accounting distributions. ChartField details may be inserted or edited.

The tab also provides the options to **Save & submit**, **Save & preview approvals**, or **Cancel requisition**. Once saved a requisition number is assigned and the page name changes to **Edit Requisition**.

Create Requisition

1. Define Requisition

2. Add Items and Services

3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit:

50100

VA Dept of Transportation

Requester:

A.HILL

Hill, A Scott (VDOT)

\*Currency:

USD

Requisition Name:Priority:

Medium

Requisition Lines

| Line                               | Description                   | Vendor Name                      | Quantity | UOM  | Price   | Total |
|------------------------------------|-------------------------------|----------------------------------|----------|------|---------|-------|
| <div><div>1</div><div></div></div> | ABRASIVES, PLASTONE 1-1/2 IN. | E & M Auto Paint and Supply Corp | 1.0000   | Roll | 0.01000 | 0.01  |

Select All / Deselect All

Total Amount: 0.01 USD

Add to Favorites

Add to Template(s)

Modify Line / Shipping / Accounting

Delete

Comments

Send to Vendor

Show at Receipt

Shown at Voucher

Approval Justification

Save & submit

Save & preview approvals

Cancel requisition

Find more items

53



# Simulation: Creating a Requisition from eProcurement

You are now about to view a simulation entitled **Creating a Requisition from eProcurement**. Click the Cardinal logo below to start the simulation.





# Create and Use eProcurement Templates

You can create personal templates using data from a previous requisition you created. This allows you to create new requisitions in eProcurement that are pre-populated with the data you save on the template, thus eliminating some data entry.

You may copy the template into a requisition. Once a requisition is created from the template, you can modify it.

To create a template:

- Access an existing requisition that contains items you will be purchasing again.
- Search for the requisition you wish to base the template on, and in the **Select Action** field, select **Edit Requisition** and click **Go**.

You can navigate to the **Manage Requisitions** page using the following path:

**Main Menu > eProcurement > Manage Requisitions**



From the **Manage Requisitions** page:

- **Business Unit** defaults.
- If you know the **Requisition ID** you want to use for your template, you may enter it.
- Set the **Request Status** to **All but Complete**.
- Click **Search**.

### Manage Requisitions

**Search Requisitions**

To locate requisitions, edit the criteria below and click the Search button.

**Business Unit:**  **Requisition Name:**   
**Requisition ID:**  **Request Status:**   
**Date From:**  **Date To:**   
**Requester:**  **Entered By:**  **PO ID:**

---

**Requisitions**

To view the lifespan and line items for a requisition, click the Expand triangle icon:

To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

| Req ID                     | Requisition Name           | BU    | Date       | Status             | Total          |  |
|----------------------------|----------------------------|-------|------------|--------------------|----------------|--|
| <a href="#">0002168464</a> | 0002168464                 | 50100 | 05/24/2016 | Pending            | 106,261.20 USD | <div> <div>&lt;Select Action&gt;</div> <div> Cancel Requisition<br/> Copy Requisition<br/> <b>Edit Requisition</b><br/> View Approvals<br/> View Printable Version </div> </div> <input type="button" value="Go"/> |
| <a href="#">0002168463</a> | 0002168463                 | 50100 | 05/23/2016 | Partially Received | 359,260.00 USD | <input type="button" value="Go"/>  |
| <a href="#">0002166703</a> | SWaM # 683844 Exp. 02/0... | 50100 | 04/19/2016 | PO(s) Dispatched   | 4,830.00 USD   | <div> <div>&lt;Select Action&gt;</div> <div> <input type="button" value="Go"/> </div> </div>   |

- Select a requisition from the search results.
- On the **Select Action** dropdown, select **Edit Requisition**.
- Click **Go**.





# Create a Personal Template (continued)

From the **Edit Requisition** page, click on the **Review and Submit** tab.

- Click the checkbox next to the line(s) you want to add to your template.
- Click on the **Add to Template(s)** button.

A template may contain one or more lines.

**Edit Requisition**

[1. Define Requisition](#)

[2. Add Items and Services](#)

**3. Review and Submit**

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit:

50100

VA Dept of Transportation

Requester:

YANI.HO

Ho, Yani (VDOT)

Requisition Name:

0002168464

\*Currency:

USD

Priority:

Medium

Requisition Lines

| Line                                  | Description                    | Vendor Name | Quantity   | UOM        | Price     | Total      |
|---------------------------------------|--------------------------------|-------------|------------|------------|-----------|------------|
| <input checked="" type="checkbox"/> 1 | SALT, SODIUM CHLORIDE, FOR ROA | Cargill Inc | 1,000.0000 | Longton US | 106.26000 | 106,260.00 |
| <input checked="" type="checkbox"/> 2 | SALT, SODIUM CHLORIDE, FOR ROA |             | 120.0000   | Cubic Yard | 0.01000   | 1.20       |

☐ [Select All / Deselect All](#)

Add to Favorites

Add to Template(s)

Modify Line / Shipping / Accounting

Delete

Total Amount:

106,261.20

USD



# Create a Personal Template (continued)

- The **Add Selected Items to Template(s)** page appears. Your previously saved templates also appear.
- In the **Add a new template** section name your new template so you can easily find it later.
- Enter a description.
- Click the **OK** button.

### Add Selected Items to Template(s)

Templates

Customize | Find | View All | First 1-2 of 2 Last

|                          | Template Name  | Description              |
|--------------------------|----------------|--------------------------|
| <input type="checkbox"/> | Helen's Test   | Test of templates        |
| <input type="checkbox"/> | Monthly Req #2 | Test to Add to Templates |

Add a new template

Template Name:

Monthly Req. 3

Description:

Monthly Req. for Sodium Chloride

✕

OK

Cancel



# Use a Personal Template

Your template is now saved. When you create a new requisition, you can use this template from the **Add Items and Services** page. Click on the **Templates** tab and add the items in your template to your shopping cart by entering a quantity and clicking the **Add** button.

Click on the **Review and Submit** tab to confirm requisition and submit for approval.

Create Requisition

1. Define Requisition

2. Add Items and Services

3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

Search

Catalog

Favorites

Templates

Forms

Web

Special Request

Description

Quantity

Test to Add to Templates

5Add

Template Items

Customize | Find | View All | First 1-2 of 2 Last

|   | Description   | Vendor      | Status | Price    |     | Quantity  | UOM        |
|---|---|-------------|--------|----------|-----|-----------|------------|
| 1 | SALT, SODIUM CHLORIDE, FOR ROAD MAINTENANCE SALT, SODIUM CHLORIDE, BULK | Cargill Inc | Active | 82.33000 | USD | 1000.0000 | Longton US |
| 2 | SALT, SODIUM CHLORIDE, FOR ROAD MAINTENANCE BULK                        |             | Active | 0.01000  | USD | 120.0000  | Cubic Yard |

Which feature allows you to add to requisition items that are not tied to a catalog?

- ☐ Special Feature
- ☐ eProcurement
- ☐ Special Items
- ☐ None of the above

The search catalog option allows you to locate an item by entering the Description, Manufacturer, Manufacturer ID, Vendor, Vendor ID number, and/or Item ID number.

- ☐ True
- ☐ False

Which features can you use when you buy the same group of items frequently?

- ☐ Favorites
- ☐ Personal templates
- ☐ None of the above



## Lesson 3: Summary

---

In this lesson, you learned how to:

- Create an eProcurement requisition
- Create and use eProcurement personal templates



# Lesson 4: Maintaining a Requisition

---

This lesson covers the following topics:

- Maintaining a Requisition in the Purchasing module
- Maintaining a Requisition in the eProcurement module

Requisitions can be maintained in either the eProcurement or Purchasing module, regardless of which module was used to create the requisition. In both modules you can access, update, review, check the status of, or view documents associated to a requisition.

The options available in the Purchasing and eProcurement modules when maintaining a requisition are generally the same. They use different menus and views, and are presented differently on the screen.

You can edit or cancel a requisition as long as it has not already been sourced to a purchase order or a sourcing event.

You can make changes even if the requisition has been approved. However, increasing the price or quantity may trigger the requisition approval workflow.





# Maintaining a Requisition in the Purchasing Module

## Purchasing Module

There are two pages from which you can view a requisition in the Purchasing module:

- **Maintain Requisitions** page
- **Requisitions** page (view only)

## Maintain Requisitions Page

From this page, you can access, edit, cancel, and change a requisition.

Navigate using the following path:

**Main Menu > Purchasing > Requisitions > Add / Update Requisitions**

Using the **Find an Existing Value** tab search for the requisition you would like to maintain. Click on the desired requisition hyperlink.

Some of the viewable features include the **Document Status** and **View Approvals**.

Requisitions

Use the following search to look for an existing Requisition.

Find an Existing Value

Add a New Value

Maximum number of rows to return (up to 300):

300

Business Unit:

=

50100

Requisition ID:

begins with

Requisition Name:

begins with

Requisition Status:

=

Origin:

begins with

Requester:

begins with

Requester Name:

begins with

Hold From Further Processing

Case Sensitive

Search

Clear

Basic Search

Save Search Criteria

Search Results

Only the first 300 results of a possible 16079 can be displayed. Enter more search key information and search again

[View All](#)

| Business Unit         | Requisition ID            | Requisition Name                                   | Requisition Status     | Origin              | Requester                      |
|-----------------------|---------------------------|--|------------------------|---------------------|--------------------------------|
| <a href="#">50100</a> | <a href="#">2075865</a>   | <a href="#">075865</a>                             | <a href="#">Denied</a> | <a href="#">ONL</a> | <a href="#">SHARON.MORALES</a> |
| <a href="#">50100</a> | <a href="#">2069457</a>   | <a href="#">RFR - S&amp;I Removal Commuter Lot</a> | <a href="#">Open</a>   | <a href="#">ONL</a> | <a href="#">HEIDI.KOVACS</a>   |
| <a href="#">50100</a> | <a href="#">002075373</a> | <a href="#">002075373</a>                          | <a href="#">Open</a>   | <a href="#">ONL</a> | <a href="#">LINDA.BOWERY</a>   |



# Maintaining a Requisition in the Purchasing Module (continued)

## Maintain Requisitions Page continued

Some of the viewable features include the **Document Status** and **View Approvals**. Click on the hyperlinks to view more details.

Maintain Requisitions

Requisition

Business Unit: 50100      \*WebIMS Req Type: Regular      Status: Denied

Requisition ID: 2075865

Requisition Name: 075865      ☐ Hold From Further Processing

Header

\*Requester: SHARON.MORALES      Morales, Sharon W. (VDOT)

\*Requisition Date: 12/16/2013      Requester Info

Origin: ONL      Online Input

\*Currency Code: USD      Dollar

Requisition Defaults

Edit Comments

Requisition Activities

Document Status

Amount Summary

Total Amount: 39.00 USD

Select Lines To Display

Line:      To:      Retrieve

Add Items From

Purchasing Kit      Catalog

Item Search      Requester Items

Line

Details      Ship To/Due Date      Status      Vendor Information      Item Information      Attributes      Contract      Sourcing Controls      WebIMS

| Line | Item       | Description | Quantity | *UOM | Category | Merchandise Amount | Price   | Status |  |  |  |  |
|------|------------|-------------|----------|------|----------|--------------------|---------|--------|--|--|--|--|
| 1    | 9540551000 | LAUNDRY AND | 130.0000 | EA   | 9540551  | 39.00              | 0.30000 | Denied |  |  |  |  |

View Approvals

\*Go to: ...More...

Save

Return to Search

Previous in List

Next in List

Notify

Refresh

Add

Update/Display



# Maintaining a Requisition in the Purchasing Module

## (continued)

### Requisitions Page

A requisition that does not need modifications, could be viewed using the **Review Requisition Information** page. This is a view only page. Navigate to this page using the following path:

**Main Menu > Purchasing > Requisitions > Review Requisition Information > Requisitions**

On the **Requisition Inquiry** page enter your search criteria and click **OK**.

Requisition Inquiry

Business Unit:

50100

Requisition ID:

0002168463

Requisition Name:

Req Status:

Requester:

Requester Name:

Requisition Date:

Vendor SetID:

STATE

Vendor ID:

Item SetID:

STATE

Item Description:

Department:

50100

0002168463

STATE

STATE

Vendor Lookup

Vendor Details

To Req:

Origin:

To:

Vendor Name:

Item ID:

☐ Direct Ship

OK

Cancel



# Maintaining a Requisition in the Purchasing Module

## (continued)

### Requisitions Page continued

The **Details** tab displays the **Requisition ID**, **Requisition Name**, **Requisition Status**, **Requester**, **Req Date** and **Total Amt**.

Click on the **Requisition** hyperlink to view **Line Details** for the requisition. Click **Return** to go back to the **Requisitions** page.

Requisitions

Req Inquiry

Customize | Find | View All | First 1 of 1 Last

Details | Status | [Filter]

| Unit  | Requisition                | Requisition Name | Requisition Status | Requester       | Req Date   | Total Amt  |     |
|-------|----------------------------|------------------|--------------------|-----------------|------------|------------|-----|
| 50100 | <a href="#">0002168463</a> | 0002168463       | Approved           | Ho, Yani (VDOT) | 05/23/2016 | 359,260.00 | USD |

Line Details

Business Unit: 50100

Requester: Ho, Yani (VDOT)

Requisition Date: 05/23/2016

Req Status: Approved

Req ID: 0002168463

Merchandise Amount: 359,260.00 USD

Requisition Details

Customize | Find | View All | First 1-3 of 3 Last

Details | More | Contract | [Filter]

| Line | Status   | Item ID    | Description                                     | Vendor ID  | Name                       | Req Qty   | UOM        | Merchandise Amt | Amount Only |                          |  |
|------|----------|------------|---|------------|----------------------------|-----------|------------|-----------------|-------------|--------------------------|--|
| 1    | Approved | 7754577327 | <a href="#">SALT, SODIUM CHLORIDE, FOR ROAD</a> | 0000015454 | Cargill Inc                | 1000.0000 | Longton US | 106,260.00      | USD         | <input type="checkbox"/> |  |
| 2    | Approved | 7656062010 | <a href="#">SNOW PLOW PARTS, MISCELLANEOUS</a>  | 0000011286 | Valk Manufacturing Company | 1000.0000 | Each       | 122,000.00      | USD         | <input type="checkbox"/> |  |
| 3    | Approved | 7656062012 | <a href="#">SNOW PLOW PARTS, MISCELLANEOUS</a>  | 0000011286 | Valk Manufacturing Company | 1000.0000 | Each       | 131,000.00      | USD         | <input type="checkbox"/> |  |



# Maintaining a Requisition in the Purchasing Module

## (continued)

From the **Requisitions** page click the **Status** tab to display the current, or completed path, of the requisition you are viewing. This tab contains hyperlinks to associated POs, Receipts and Vouchers, as well as, icon hyperlinks to the **Document Status**, **Approval Status** and **Comments**.

In this example, clicking on the hyperlink for **On PO** will take you to the **Requisition to Purchase Order List** which will have additional hyperlinks to the POs. Clicking on the hyperlink for **Received** will take you to the **Requisition Receipts List** which will have additional hyperlinks to the receipts.

In the example below the requisition went to PO and has been received, but not yet vouchered.

| Requisitions |                            |                  |              |        |       |                         |          |        |            |                      |  |  |  |
|--------------|----------------------------|------------------|--------------|--------|-------|-------------------------|----------|--------|------------|----------------------|--|--|--|
| Req Inquiry  |                            |                  |              |        |       |                         |          |        |            |                      |  |  |  |
| Details      |                            | Status           |              |        |       |                         |          |        |            |                      |  |  |  |
| Unit         | Requisition                | Requisition Name | Change Order | On RFQ | On PO | Direct Ship from Vendor | Received | On MSR | On Voucher | Use Procurement Card |  |  |  |
| 50100        | <a href="#">0002168463</a> | 0002168463       |              |        | Y     |                         | P        |        |            |                      |  |  |  |



You can also manage a requisition using the eProcurement module from the **Manage Requisitions** page. From this page, you can cancel, copy, edit, pre-check, and view a printable version of the requisition.

Navigate to the **Manage Requisitions** page using the following path:

## Main Menu > eProcurement > Manage Requisitions

Search for the requisition you would like to maintain.

To view more details about a requisition click on the expand triangle icon to the right of the **Req Id.**

To cancel, copy, edit or view a requisition, make the action selection from the dropdown list and click **Go**.

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# Maintaining a Requisition in the eProcurement Module (continued)

### Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: 50100

Requisition Name:

Requisition ID:

Request Status: Open

Date From: 01/01/2016

Date To: 01/31/2016

Requester:

Entered By:

PO ID:

Search

Clear

#### Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon:  
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

| Req ID                     | Requisition Name               | BU    | Date       | Status | Total         |                                     |
|----------------------------|--------------------------------|-------|------------|--------|---------------|-------------------------------------|
| <a href="#">0002156150</a> | Incidental Concrete            | 50100 | 01/26/2016 | Open   | 99,000.00 USD | <div>&lt;Select Action&gt; Go</div> |
| <a href="#">0002156121</a> | EMERGENCY-I66<br>CHEMUNG       | 50100 | 01/26/2016 | Open   | 36,000.00 USD | <div>&lt;Select Action&gt; Go</div> |
| <a href="#">0002155597</a> | EMERGENCY SNOW-<br>MADISON ... | 50100 | 01/24/2016 | Open   | 27,500.00 USD | <div>&lt;Select Action&gt; Go</div> |
| <a href="#">0002154799</a> | 0002154799                     | 50100 | 01/20/2016 | Open   | 18,569.34 USD | <div>&lt;Select Action&gt; Go</div> |
| <a href="#">0002154539</a> | Richmond CEI workshop          | 50100 | 01/19/2016 | Open   | 10,721.27 USD | <div>&lt;Select Action&gt; Go</div> |
| <a href="#">0002154463</a> | Roanoke CEI                    | 50100 | 01/19/2016 | Open   | 13,301.25 USD | <div>&lt;Select Action&gt; Go</div> |
| <a href="#">0002154218</a> | 0002154218                     | 50100 | 01/14/2016 | Open   | 3,304.19 USD  | <div>&lt;Select Action&gt; Go</div> |
| <a href="#">0002153899</a> | DISTRICT LOCATION &<br>DESIGN  | 50100 | 01/12/2016 | Open   | 4,810.00 USD  | <div>&lt;Select Action&gt; Go</div> |
| <a href="#">0002153451</a> | Sweeping Services - Int        | 50100 | 01/07/2016 | Open   | 87,960.00 USD | <div>&lt;Select Action&gt; Go</div> |





# Maintaining a Requisition in the eProcurement Module (continued)

When you expand a line you are provided with a pictorial representation of the requisition lifespan and its status. Each active (blue) icon will hyperlink you to the document associated to the requisition (purchase order, receipt, etc.). Click on an active icon, to view the details.

**Manage Requisitions**

▼ Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: 50100

Requisition ID:

Date From:

Requester: YANI.HO

Requisition Name:

Request Status: All but Complete

Date To:

Entered By:

PO ID:

Search

Clear

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon:  
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

| Req ID       | Requisition Name | BU    | Date       | Status  | Total          |                    |
|--------------|------------------|-------|------------|---------|----------------|--------------------|
| ▼ 0002168464 | 0002168464       | 50100 | 05/24/2016 | Pending | 106,261.20 USD | <Select Action> Go |

Requester: Ho, Yani (VDOT) Entered By: HALL, MIKE Priority: Medium

Requisition

Approvals

Inventory

Purchase Orders

Change Request

Receiving

Returns

Invoice

Payment

Request Lifespan:

Line Information

| Line | Description                     | Status           | Price         | Quantity   | UOM | Vendor      |   |
|------|---------------------------------|------------------|---------------|------------|-----|-------------|---|
| 1    | SALT, SODIUM CHLORIDE, FOR R... | Pending Approval | 106.26000 USD | 1,000.0000 | LTN | Cargill Inc | ✗ |
| 2    | SALT, SODIUM CHLORIDE, FOR R... | Pending Approval | 0.01000 USD   | 120.0000   | YDQ |             | ✗ |

▼ 0002168463 0002168463 50100 05/23/2016 Partially Received 359,260.00 USD <Select Action> Go

▼ 0002168703 SWaM # 683844 Exp. 02/0 ... 50100 04/19/2016 PO(s) Dispatched 4,830.00 USD <Select Action> Go





# Maintaining a Requisition in the eProcurement Module (continued)

Clicking on the **Requisition** icon in the lifespan opens the **Requisition Details** page. If you need to edit the requisition, click the **Edit Requisition** button. The requisition will open in the module it was created in, eProcurement or Purchasing.

Requisition Details

| Requisition Name | Requisition ID | Unit  | Date       | Status  | Total      |
|------------------|----------------|-------|------------|---------|------------|
| 0002168464       | 0002168464     | 50100 | 05/24/2016 | Pending | 106,261.20 |

| Line | Item Description                                | Source Status | Amount Only | Qty                   | Price         | Status  | Total      |
|------|---|---------------|-------------|-----------------------|---------------|---------|------------|
| 1    | <a href="#">SALT, SODIUM CHLORIDE, FOR R...</a> | Not Source    | N           | 1,000.0000 Longton US | 106.26000 USD | Pending | 106,260.00 |
| 2    | <a href="#">SALT, SODIUM CHLORIDE, FOR R...</a> | Not Source    | N           | 120.0000 Cubic Yard   | 0.01000 USD   | Pending | 1.20       |

Edit Requisition

[Return to Manage Requisitions](#)[Requisition Schedule and Distribution](#)



# Maintaining a Requisition in the eProcurement Module (continued)

If active, click on the **Approvals** icon in the lifespan to view the status of the approvals for the selected requisition.

Approval Status

Business Unit:50100

Requisition ID:0002168464

Requisition Name:0002168464

Requester:[Ho, Yani \(VDOT\)](#)

Entered on:05/24/2016

Status:Pending

Priority:Medium

Requester's Justification:  
No justification entered by requester.

Total Amount:106,261.20 USD

[View printable version](#)

Line Information

Review/Edit Approvers

Req for Supervisor Action

Requisition 0002168464:Approved

Req - Requester's Supervisor

Approved

✓

[Parris, Brenda G. \(VDOT\)](#)

Requester's Supervisor

05/24/16 - 09:53 AM

Req for Procurement Mgr Action

Requisition 0002168464:Pending

Req - Procurement Manager

Pending

🕒

[Multiple Approvers](#)

Approval Assignment to Buyer

[Return to Manage Requisitions](#)

Requisitions can be maintained in either the eProcurement module or the Purchasing module, regardless of which module was used to create the requisition.

- ☐ True
- ☐ False

You cannot cancel a requisition after the requisition has been approved.

- ☐ True
- ☐ False



## Lesson 4: Summary

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In this lesson, you learned how to:

- Maintain a requisition using the Purchasing module
- Maintain a requisition using the eProcurement module



# Lesson 5: Reports and Online Inquiries

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This lesson covers the following topics:

- Reports
- Online Inquiries



# Reports

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There are several requisition reports available including:

- Print Requisitions Report
- Purchase Order / Requisition Cross Reference Report

Additional reports can be found in the Reports Catalog located on the Cardinal website in the VDOT Toolbox.



# Print Requisitions

The **Print Requisition** report displays the requisition(s) based on the selected **Statuses to Include** values of **Approved**, **Cancelled**, **Completed**, **Open**, and/or **Pending**.

You can navigate to the report using the following path:

**Main Menu > Purchasing > Requisitions > Reports > Print Requisition**

Create or use an existing **Run Control ID** and then enter the report parameters.

For additional details on creating and using existing **Run Control IDs**, as well as report navigation, please see the course titled **SW NAV220 Cardinal Reporting**.





# Print Requisitions (continued)

## Requisition

Ship To: VDOT Highpoint Area Hdqts  
Rt 609, 1 Mile West Rt 58  
Castlewood VA 24224

|                     |            |          |          |
|---------------------|------------|----------|----------|
| Business Unit:      |            | 50100    | APPROVED |
| Req ID:             | Date       | Page     |          |
| 0002177436          | 08/25/2016 | 1        |          |
| Requisition Name:   |            |          |          |
| 0002177436          |            |          |          |
| Requester           |            | Currency |          |
| Helen Ardman (VDOT) |            | USD      |          |
| Requester Signature |            |          |          |

| Line-Schd | Item       | Description                | Mfg ID | Quantity   | UOM | Price | Extended Amt | Due Date |
|-----------|------------|----------------------------|--------|------------|-----|-------|--------------|----------|
| 1-1       | 7503548485 | STONE, CRUSHED<br>GRADE 26 |        | 2,000.0000 | LTN | 8.50  | 17,000.00    |          |

Buyer: Fields, Patricia (VDOT)  
Vendor: 0000051715 Rogers Group Incorporated  
Attn: Fields, Patricia (VDOT)

Contract ID: 0000000000000000000044725    Version: 1    Contract Line: 3    Category Line: 0

Line Total: 17,000.00

Total Requisition Amount: 17,000.00

Contract Requisition restock requested by Jeffrey Campbell  
to be stock at Highpoint Parsonage. Contract # 44725 Exp 4/30/17  
Line 3



# Purchase Order / Requisition Cross Reference

The **PO / Requisition Xref** report allows you to print requisitions tied to a purchase order. The **Business Unit** field must be entered. If you leave the **From Date** and **Through Date** fields blank, all requisitions are included.

You can navigate to the **PO / Requisition Xref** Report using the following path:

**Main Menu > Purchasing > Requisitions > Reports > PO / Requisition Xref**

ORACLE

Report ID: POY1100

User ID: PPS\_MIKE.HALL

Run Control: PRINT\_PO

PeopleSoft Purchasing

REQUISITION TO PO XREF REPORT

Req Dates Included: 9/3/2012

Thru: 9/7/2012

Business Unit: 50100

Requisition

| ID                           | Lin/Sch/Dst | Date     | Item ID    | Description  | Quantity  | UOM | PO ID      | Contract ID        |
|------------------------------|-------------|----------|------------|--|-----------|-----|------------|--------------------|
| 0002028709                   | 1 1 1       | 9/4/2012 | 5500416690 | REFLECTORIZED GLASS BEADS, BAG   | 40,000.00 | LBR | 0001039244 | 000000000000031554 |
| Requisition Name: 0002028709 |             |          |            |  |           |     |            |                    |
| 0002028722                   | 1 1 1       | 9/4/2012 | 6453330113 | PAPER, COPY, FOR USE IN HIGH SPEED XEROX COPIERS 8 1/2 IN. X 11 IN. RECYCLED MULTI-USE WHITE PAPER | 40.00     | EA  | 0001039461 |                    |
| Requisition Name: 0002028722 |             |          |            |  |           |     |            |                    |
| 0002028736                   | 1 1 1       | 9/4/2012 | 7503001000 | CONCRETE, PRECAST CONCRETE, PRECAST  | 32.00     | EA  | 0001039748 |                    |
| Requisition Name: 0002028736 |             |          |            |  |           |     |            |                    |



# Purchase Order / Requisition Cross Reference (continued)

**ORACLE**

Report ID: POY1100  
User ID: PPS\_MIKE.HALL  
Run Control: PRINT\_PO

PeopleSoft Purchasing  
REQUISITION TO PO XREF REPORT

Page No. 1  
Run Date 10/11/2012  
Run Time 12:51:43PM

Req Dates Included: 9/3/2012 Thru: 9/7/2012  
Business Unit: 50100

| Requisition                  |             |   |   |          |            |  | Purchase Order |     |            |                    |     |           |             |   |   |           |     |        |
|------------------------------|-------------|---|---|----------|------------|--|----------------|-----|------------|--------------------|-----|-----------|-------------|---|---|-----------|-----|--------|
| ID                           | Lin/Sch/Dst |   |   | Date     | Item ID    | Description  | Quantity       | UOM | PO ID      | Contract ID        | Rel | Ship Date | Lin/Sch/Dst |   |   | Quantity  | CUR | Price  |
| 0002028709                   | 1           | 1 | 1 | 9/4/2012 | 5500416690 | REFLECTORIZED GLASS BEADS, BAG   | 40,000.00      | LBR | 0001039244 | 000000000000031554 | 34  | 9/4/2012  | 1           | 1 | 1 | 40,000.00 | USD | 0.29   |
| Requisition Name: 0002028709 |             |   |   |          |            |  |                |     |            |                    |     |           |             |   |   |           |     |        |
| 0002028722                   | 1           | 1 | 1 | 9/4/2012 | 6453330113 | PAPER, COPY, FOR USE IN HIGH SPEED XEROX COPIERS 8 1/2 IN. X 11 IN. RECYCLED MULTI-USE WHITE PAPER | 40.00          | EA  | 0001039461 |                    |     | 9/5/2012  | 1           | 1 | 1 | 40.00     | USD | 28.03  |
| Requisition Name: 0002028722 |             |   |   |          |            |  |                |     |            |                    |     |           |             |   |   |           |     |        |
| 0002028736                   | 1           | 1 | 1 | 9/4/2012 | 7503001000 | CONCRETE, PRECAST CONCRETE, PRECAST  | 32.00          | EA  | 0001039748 |                    |     | 9/6/2012  | 1           | 1 | 1 | 32.00     | USD | 85.00  |
| Requisition Name: 0002028736 |             |   |   |          |            |  |                |     |            |                    |     |           |             |   |   |           |     |        |
|                              | 2           | 1 | 1 | 9/4/2012 | 7503001000 | CONCRETE, PRECAST CONCRETE, PRECAST  | 1.00           | EA  | 0001039748 |                    |     | 9/6/2012  | 2           | 1 | 1 | 1.00      | USD | 425.00 |
| Requisition Name: 0002028736 |             |   |   |          |            |  |                |     |            |                    |     |           |             |   |   |           |     |        |
|                              | 3           | 1 | 1 | 9/4/2012 | 7503001000 | CONCRETE, PRECAST CONCRETE, PRECAST  | 30.00          | EA  | 0001039748 |                    |     | 9/6/2012  | 3           | 1 | 1 | 30.00     | USD | 8.85   |
| Requisition Name: 0002028736 |             |   |   |          |            |  |                |     |            |                    |     |           |             |   |   |           |     |        |
| 0002028740                   | 1           | 1 | 1 | 9/4/2012 | 9393701000 | ELECTRONIC EQUIPMENT MAINT. AND REPAIR   | 3.00           | HUR | 0001039464 |                    |     | 9/5/2012  | 1           | 1 | 1 | 3.00      | USD | 450.00 |
| Requisition Name: 0002028740 |             |   |   |          |            |  |                |     |            |                    |     |           |             |   |   |           |     |        |
|                              | 2           | 1 | 1 | 9/4/2012 | 9393701000 | ELECTRONIC EQUIPMENT MAINT. AND REPAIR   | 4.00           | HUR | 0001039464 |                    |     | 9/5/2012  | 2           | 1 | 1 | 4.00      | USD | 450.00 |
| Requisition Name: 0002028740 |             |   |   |          |            |  |                |     |            |                    |     |           |             |   |   |           |     |        |
|                              | 3           | 1 | 1 | 9/4/2012 | 9628601000 | TRANSPORTATION OF GOODS (FREIGHT)  | 1.00           | EA  | 0001039464 |                    |     | 9/5/2012  | 3           | 1 | 1 | 1.00      | USD | 50.00  |
| Requisition Name: 0002028740 |             |   |   |          |            |  |                |     |            |                    |     |           |             |   |   |           |     |        |
| 0002028751                   | 1           | 1 | 1 | 9/4/2012 | 3507065000 | FLAGS, STATE, NYLON  | 15.00          | EA  | 0001039942 |                    |     | 9/7/2012  | 1           | 1 | 1 | 15.00     | USD | 55.34  |
| Requisition Name: 0002028751 |             |   |   |          |            |  |                |     |            |                    |     |           |             |   |   |           |     |        |



# Online Inquiries

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There are numerous requisition online inquiries available. Key requisition online inquiries include:

- Requisition Inquiry
- Document Status



# Requisition Inquiry

You can research the history of a requisition by using the **Requisition Inquiry** page. Depending on the status of the requisition, you can drill down nearly to all the information you need relating to a specific requisition.

You can navigate to the **Requisition Inquiry** page using the following path:

**Main Menu > Purchasing > Requisitions > Review Requisition Information > Requisitions**

You may also use the following path to view the history: **Main Menu > eProcurement > Manage Requisitions**

**Requisition Inquiry**

|                   |  |                                      |                      |
|-------------------|--|--------------------------------------|----------------------|
| Business Unit:    | <input type="text" value="50100"/>                               | To Req:                              | <input type="text"/> |
| Requisition ID:   | <input type="text"/>   | Origin:                              | <input type="text"/> |
| Requisition Name: | <input type="text"/>   | To:                                  | <input type="text"/> |
| Req Status:       | <input type="text"/>   | Vendor Name:                         | <input type="text"/> |
| Requester:        | <input type="text"/>   | Item ID:                             | <input type="text"/> |
| Requester Name:   | <input type="text"/>   | <input type="checkbox"/> Direct Ship |                      |
| Requisition Date: | <input type="text"/>   |                                      |                      |
| Vendor SetID:     | <input type="text" value="STATE"/> <a href="#">Vendor Lookup</a> |                                      |                      |
| Vendor ID:        | <input type="text"/> <a href="#">Vendor Details</a>              |                                      |                      |
| Item SetID:       | <input type="text" value="STATE"/>                               |                                      |                      |
| Item Description: | <input type="text"/>   |                                      |                      |
| Department:       | <input type="text"/>   |                                      |                      |



# Requisition Inquiry (continued)

Requisition Inquiry

Business Unit:

50100

Requisition ID:

Requisition Name:

Req Status:

Requester:

Requester Name:

Requisition Date:

Vendor SetID:

STATE

Vendor ID:

Item SetID:

STATE

Item Description:

Department:

To Req:

Origin:

To:

Vendor Name:

Item ID:

☐ Direct Ship

OK

Cancel



# Document Status

The **Document Status** page allows you to view documents that are tied to the requisition including contracts, events, purchase orders, receipts, and vouchers.

In the Purchasing module, a hyperlink on the **Requisition** page allows you to view the Document Status.

You can also navigate to the **Document Status** page using the following path:

**Main Menu > Purchasing > Requisitions > Review Requisition Information > Document Status .**

Document Status

Business Unit:50100

Document Date:09/17/2012

Currency:USD

Requester:

Req ID:0002030133

Status:Approved

Document Type:Requisition

Merchandise Amt:285,778.00

Budget Status:Valid

Associated Document

CustomizeFindView AllFirst1-2 of 2Last

Documents

Related Info

| SetID | Business Unit | Document Type  | DOC ID                    | Status     | Document Date | Vendor ID  | Location |  |
|-------|---------------|----------------|---------------------------|------------|---------------|------------|----------|--|
| STATE |               | Contract       | 0000000000000000000040239 | Approved   | 03/16/2012    | 0000053072 |          |  |
|       | 50100         | Purchase Order | 0001041513                | Dispatched | 09/18/2012    | 0000053072 | MAIN     |  |

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# Document Status (continued)

## Document Status

Business Unit:

50100

Req ID:

[0002030133](#)

Document Date:

09/17/2012

Status:

Approved

Currency:

USD

Document Type:

Requisition

Requester:

Merchandise Amt:

285,778.00

Budget Status:

Valid

| Associated Document                               |               |                |   |            |               |            |          |  |
|---|---------------|----------------|---|------------|---------------|------------|----------|--|
| Customize   Find   View All   First 1-2 of 2 Last |               |                |   |            |               |            |          |  |
| Documents Related Info                            |               |                |   |            |               |            |          |  |
| SetID   | Business Unit | Document Type  | DOC ID                                    | Status     | Document Date | Vendor ID  | Location |  |
| STATE   |               | Contract       | <a href="#">0000000000000000000040239</a> | Approved   | 03/16/2012    | 0000053072 |          |  |
|   | 50100         | Purchase Order | <a href="#">0001041513</a>                | Dispatched | 09/18/2012    | 0000053072 | MAIN     |  |

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## Lesson 5: Summary

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In this lesson, you learned how to:

- Describe the key requisition reports available.
- Describe the key requisition online inquiries available.



# Lesson 6: Processing Requisitions Hands-On Practice

This lesson includes practice that will reinforce the lessons learned today. Your instructor will provide direction regarding specific activities that are part of this lesson. Please ask your instructor if you have any questions.





# Course Summary

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In this course, you learned how to:

- Describe requisition concepts, processes, integration and interfaces.
- Create and submit a requisition in the Purchasing and the eProcurement modules.
- Maintain a requisition in the Purchasing and the eProcurement modules.
- Explain and describe key reports and online inquires used with processing requisitions



# Course Evaluation

Congratulations! You successfully completed the **501 PR342: Processing Requisitions** course. Please use the evaluation link to assess this course.

[Click here to access the survey](#)

Once you have completed and submitted the survey, close the survey window. To close the web based training course, click the 'X' button in the upper right corner.





# Appendix

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- Key Terms
- Flowchart Key



# Key Terms

**Accounting Distribution:** ChartField string that defines how a transaction is charged (i.e., which fund, program department, account, etc.).

**Buyer:** A Buyer is an Individual authorized to create a purchase order.

**eProcurement module:** The eProcurement module provides a web-based solution, similar to a shopping cart experience, for the activities associated with requesting goods and services.

**Favorite Item:** Favorites are items frequently ordered that a user can maintain in a single location. Cardinal automatically builds this list showing the last date the item was requested and the number of times the item has been requested. You can manually add to this list of frequently ordered (favorite) items and use the list to add items to a requisition without searching the item catalog.

**General Ledger:** The module that contains all the accounts (e.g., Budget, Actuals, Modified Accrual, Full Accrual and Cash) used to track accounting transactions. The General Ledger serves as the basis for the preparation of financial statements.

**Item:** An item represents the goods or services provided by vendors. There is a unique identifier for each item. Items are important for analyzing the total purchase and facilitate the negotiation of a contract with a vendor and Strategic Sourcing activities.

**Item Category:** Groups of similar items. Cardinal allows for the definition of item categories, which can greatly reduce the repetitive tasks associated with service and material purchases.

**Procurement :** Procurement is the principles, standards, and guidelines related to public purchasing.



## Key Terms (continued)

**Project:** A project is a structure used to track costs, generally over an extended period of time. It generally has a finite beginning and end. Typically it requires both fiscal year and life to date budget and actual reporting (e.g., Upgrade signal at Harry Byrd Hwy & Sterling Blvd is **0000094859**).

**Purchase Order:** A purchase order is a commitment from an agency to a vendor to purchase goods or services from that vendor. It lists purchase information, such as item, quantity, freight terms, shipping terms, payments terms, and shipping instructions, and is part of the contractual nature of the purchase order.

**Purchasing Module:** The Purchasing Module facilitates the buying of goods and services and the processing of requisitions. Purchasing is the actual transaction between an agency and a vendor.

**Req Sourced from Contract:** This step identifies whether a contract has already been established with the vendor.

**Requisition:** A requisition is the request for items or services. A requisition is an online form that you use to request goods or services. Requisitions can be created from the eProcurement or Purchasing module.

**Schedule:** The schedule defines when and where you want the line items delivered. Schedule is under the **Ship To / Due Date** tab in the **Line** section of the requisition. The schedule includes the **Due Date**, the **Ship Date**, and the **Ship To** location for the goods. One schedule can include many lines (individual items each with its own description and price).

**Sourcing:** Sourcing is the process of creating purchase orders from requisitions.



## Key Terms (continued)

**SpeedChart:** A shorthand key that automatically populates some ChartFields in one or more accounting distributions.

**Storekeeper:** The person(s) responsible for handling orders placed via Cardinal and being filled by WebIMS. The District Storekeeper orders, receives, and issues WebIMS stock.

**Strategic Sourcing :** Strategic sourcing refers to the process of determining the best suppliers for needed goods and/or services, and the conditions under which you award them your business. The Strategic Sourcing module allows end users to create and/or award bids, proposals, purchase orders, and contracts in Cardinal.

**Submit Requisition for Approval:** When the requisition has all the required item lines and additional data entered, the Requisitioner submits the requisition for approval.

**Template:** A template provides a quick way to create a requisition using previous requisition information.



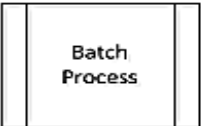
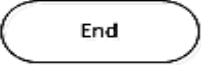
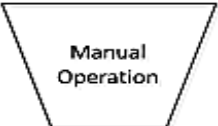
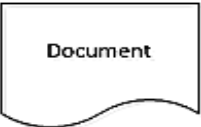




**Vendor:** Any person or other entity that provides goods and/or services, or receives refunds, including suppliers, federal, state or local government entities, and other fiscal payees. All procurement vendors are interfaced from eVA to Cardinal. Non-procurement vendors (also called Fiscal Payees) will be created directly in Cardinal. Employees are not vendors for their own agencies..

**WebIMS:** WebIMS is a custom order fulfillment solution used specifically to order goods such as safety gear, salt or sand for snow treatment, etc. When this type of good is ordered, Cardinal interfaces with WebIMS to fulfill that order.





# Flowchart Key

| Flowchart Key   |  |   |   |
|---|--|---|---|
|    | Depicts a process step or interface.   |    | Indicates point at which the process begins. Does not represent any activity.   |
|    | Specifies a batch process.   |    | Indicates point at which the process ends. Does not represent any activity.   |
|    | Depicts a process step that is performed manually.   |    | Depicts a document of any kind, either electronic or had copy.  |
|   | Defines the possible outcomes of a decision or analysis that took place in a step immediately preceding. |  | Indicates an On-Page or Intra Process Connector. Used to avoid complex overlapping connector lines or to continue a process on a subsequent page. |
|  | Represents an entity (person, organization, etc.).   |  | Connects steps between business processes.  |